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ABSTRACT

A study explored current practice in organizing and resourcing training and development (T&D) using survey responses from over 100 major private and public sector employers and case studies of T&D functions in 6 organizations. Business drivers for T&D were senior management as customers; diagnosis of training as "the solution;" individual employees as customers; and translation of business needs into training needs. Diverse methods were used to deliver training. E-learning, use of the corporate university concept, and coaching by specialist coaches and line managers increased. Nearly one-third of respondents had in-company training centers; case studies showed varied ways in which they can operate. Research indicated a function struggling to find organizational forms to meet business challenges. Structural forms were centralized, key account holder, devolved, business partner, shared service, outsourced, and stakeholder models. A number of roles were predicted to increase in importance, including trainer as facilitator, organizational change agent, and policy strategist. Role clusters in training were training deliverer, manager, advisor, and designer and facilitator. Organizations predicted T&D staff will need to be increasingly skilled, with biggest predicted needs in business awareness, influencing and negotiation, and project management. Increasing demands of new training roles were leading to resourcing challenges, such as recruiting into T&D. (Appendixes include a 32-item bibliography and overview of case studies.) (YLB)

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Executive Summary

Over recent years, there have been many changes in the way HR services have been resourced and delivered. Much attention has been paid to the devolution of responsibility for implementation of HR to line managers, the centralisation of administrative HR activities into HR shared services, and to the adoption of 'e-HR' integrated systems and employee 'self-service'. But what has been happening meanwhile to the way training and development services are resourced? In the context of the wider HR debate, training often gets mentioned in terms of outsourcing and e-learning, but this is hardly a comprehensive analysis of the challenges and changes faced by the training function and the staff who work in it.

This lack of research prompted a group of IES Research Network member organisations to support a study to explore the changing face of the training and development function.

The research included survey responses from over a hundred major private and public sector employers and detailed case studies of the training and development functions in six organisations. These were chosen for their adoption of varied strategies, structures and delivery methods for training.

Training and business strategy

The study explored the concept of aligning training with business strategy. What we found highlighted why such a diverse landscape of training functions, by shape, size and structure, has arisen. At the heart of the variations in training functions is not just the level of demand, but rather differences in:

- criticality of business need
- speed of response required
- what the business can afford at any particular time
- stage in the organisation 'life-cycle'
- competitiveness of the labour market.

Diverse delivery methods

As expected, the survey showed a diverse range of methods used to deliver training. There are increases in e-learning and the use of the corporate university concept, and also in coaching, both by specialist coaches and by line managers. Nearly one-third of the survey respondents had in-company training centres, and the case studies showed the very varied ways in which these can operate.

The diversity of approaches to delivering training has obvious implications for staff working in the function, but also deeply affects line managers, who identify training needs and often are also key players in delivery.

Finding effective structures

The research shows a function struggling to find organisational forms that can help it meet these business challenges. The considerable debate on the nature and structure of the HR function has not altogether addressed the particular challenges of the training function.

The chain of activity, from strategy to implementation, is not the same in training and development as it is in, for example, pay. Pay strategy and policy translate into pay procedures. Key decisions on individual pay are determined by these procedures and the judgement of managers. An administrative system pays money into a bank account. So the role of HR in pay is in policy, design of frameworks and procedures, advice to the line and administration. In training, by contrast, strategy and policy are not about procedures. Needs analysis and design are much more situation-specific, and delivery is not through an administrative system but by a trainer or a manager, or self-managed use of resources – or all of these together. It is clear, therefore, that training and HR need different structures, roles and skills.

Specific structural forms found in this study included:

- a centralised function, offering services to the organisation
- a key account holder model with particular individuals in the central function responsible for linking with business units
- a devolved model with training teams out in business units
- a business partner model with an individual or small team out in the business unit, linking it to a central service and working closely with local managers
- a shared service model, putting training in with other business or HR services used by the business
- an outsourced model.

The survey did not reveal a single direction of change in terms of structure, and most of the case study organisations had hybrids of these structures, balancing the very real advantages of both centralised provision and decentralised responsiveness.

Although it has been popular to separate routine training provision from the more 'strategic' aspects of policy development, there are dangers in pressing this too far. This simple separation of delivery on the one hand and policy on the other, leaves unclear the location of training advice, which is seldom a simply 'transactional' service.

Is the outsourcing tide turning?

For all the organisations involved in this project, a key decision in maximising organisational effectiveness concerns which aspects of training and development to outsource, and which to supply in-house.

Our survey respondents most commonly reported using more than ten outsourced suppliers of training and development activities. Private sector organisations were generally both more likely to outsource, and to use larger numbers of outsourced suppliers, than their public sector counterparts.

However, there are hints from our study that recent moves have been made to pull some training and development activity back in-house. This is despite initial cost reduction and consistency benefits of outsourcing and/or centralising training services in HR shared service centres. The reasons for the reconsideration of outsourcing seem to include:

- an adverse impact of outsourcing on responsiveness and quality
- lack of development of the transformational opportunities of training and organisational development by those who remained inside the organisation after the separation of transactional services
- people in the outsourced delivery organisation(s) becoming closer to the customer than those who remained inside – weakening the corporate understanding of training needs.

Roles and role clusters

The shifting organisational forms of training, coupled with multiple delivery methods, are not leading to a single new 'role' for the trainer, but rather an array of different role demands. The survey showed a number of roles predicted to increase in importance, with the trainer as:

- a facilitator
- an organisational change agent
- a policy strategist.

Other important roles included: evaluation, business planning, training design, outsourced services management, external benchmarking, training needs identification, career development support. The only role that was felt likely to become less important for training staff in employing organisations was the direct delivery of formal training – a reduction especially marked in the public sector.

Analysis of the survey and case study discussions indicates that there are now some clusters of types of work (or roles) in training, all of which are important in different ways. The posts or jobs in a training function often cover more than one of these work types.

Most of the discussions during the course of this research distinguished the role of '**training deliverer**' (meaning the running of fairly traditional courses and also, increasingly, the provision of e-learning solutions) from roles other than this. In some circumstances, training delivery also includes a commercial role – that of selling or promoting training provision to the customer. Figure 1 splits out three clusters of roles that seem to sit within the 'non-delivery' aspects of training.

Figure 1: Role clusters within the training function

Source: IES, 2002

Training manager concerns leadership of the training function, its overall nature and direction (often called strategy), its staffing and staff development and financial management. It also covers dealing with the various stakeholders, including the management of external providers. Where training is highly devolved, much of this management function is carried out locally.

Training adviser covers a range of roles that seem to be growing in importance, especially in the 'business partner' and 'learning counsellor' views of training. Advising line managers can relate to individual employees, to groups of employees, or to specific business needs, so again can be a high level/corporate role and/or a much more intimate and local role. It often has a focus on helping line managers to see a clearer link between the training activity they request and the real business issues they are facing.

Close to this advisory role lie aspects of delivering learning through being a **facilitator** of various kinds of events or

interventions, often directed at supporting organisational change. Some organisations have 'OD' groups or 'change agents' which specialise in this role. In others, it is an increasing part of the work of a traditional training team.

The final component of the diagram is a role cluster we call '**training designer**'. This role includes the critical bridges *between* the business need for training and its delivery. It includes analysis of skills (especially from a broader business perspective), assessment of the skills of individuals (*eg* by occupational psychologists within the training team), design of training and development activities, and quality control/evaluation. Where the delivery of training has become separated from its commissioning, key elements of the designer role have often gone missing, with a consequent loss of match between how the need is seen (often by the adviser) and how it is delivered. Evaluation is seen as an important role in a future training function, but can also slip through the net between advisers and deliverers.

The function's future skill needs and resourcing

Organisations predicted that training and development staff will need to be increasingly skilled in a number of areas, with the biggest predicted needs in:

- business awareness
- influencing and negotiation
- project management.

Over 50 per cent of survey respondents also saw rising skill needs in coaching, customer focus, working with ICT, facilitating and consulting.

The increasing demands of the new training roles emerging in this study are already leading to some resourcing challenges. Fifty per cent of the survey respondents were finding it difficult or very difficult to recruit good training professionals with the new skills they require. The new breed of advisers are especially difficult to recruit, as they need broad business understanding plus a range of consulting and facilitation skills.

In the past, the career path from training support to training delivery was easier. In future, the high level skills required in

adviser roles, the outsourcing of much delivery, and the increasing expectation of professional qualifications may make this career path much less accessible.

Some organisations are re-thinking their future sources of supply for training staff and starting to look more to experienced line managers as well as those with training or HR experience. Such line managers should have business understanding, but need access to professional development that will help them acquire knowledge of training concepts and methods, and develop their facilitation skills.

1. Introduction

This report aims to provide a practical overview of current practice in how major employers are organising and resourcing their training and development activities, and the criteria they apply to determine these arrangements.

Over recent years there have been may changes in the way HR services have been resourced and delivered. Much attention has been paid to the devolution of responsibility for implementation of HR policy to line managers, the centralisation of administrative HR activities into shared services, and to the adoption of 'e-HR' integrated HR systems and employee self-service. But what of how training and development services are resourced? The most mention it seems to get in this context has been the odd throw-away line about how training delivery is a ideal target for outsourcing, along with payroll and recruitment! The absence of coverage about the organisation and quality of training and development during recent years has become an issue of concern to employing organisations.

1.1 Research objectives

This research project was funded by the IES 'Employee and Management Development' Research Network, through which a group of corporate members shape, and often participate in, applied research on HRD issues. These employers were interested in the resourcing of training and development.

The focus of the research was therefore upon the training and development function. The meaning of the term 'function' is not always a clear one. Some people doing specialist training jobs

would consider themselves part of a training function, or team, whilst others do not. Sometimes people consider themselves part of a wider HR or business support function, whilst others are integrated into the operations of their organisation or get involved with training only occasionally, and are scattered throughout the organisation. Throughout this study we sought an alternative term to 'function'. Alas we never encountered one. For the purpose of this report what we mean by training and development function is, collectively, those individuals associated with an employing organisation who are involved in any way with training, management development, personal development, education or career development activities.

Key research questions for this study were as follows.

Drivers and positioning

- Where does responsibility for the training and development activity sit, and how far is it devolved?
- To what extent is there central planning or co-ordination, and how does the business drive training and development?
- How does training and development link with the HR/ Personnel function and with the line?
- Are there significant external influences at work, *eg* regulatory or professional bodies?
- What criteria are used in deciding to resource particular types of training need and how to shape the function as a whole?

Trends in delivery and resources

- What are the main trends in the delivery of training and what resources are used in the delivery?
- What has the impact been of new training delivery models *eg* e-HR, corporate universities, outsourcing, in- house training centres, line managers as coaches?

Changing roles, skills and careers

- To what extent have changes in training activity created new roles in training and development?
- How are the patterns of resourcing training affecting the numbers, roles and skills of internal/external staff?

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- How has the role of the 'trainer' been changing?
- What is happening to the careers of those involved in training and development and their own skill development?

Within the context of these key questions, the research sought to explore:

- What are the patterns of resourcing training and development in organisations, and do organisations feel they are appropriate?
- What future changes are predicted in the resourcing of training and development?

1.2 Research methods

There were four main aspects to this study.

Literature review

First, a review was conducted. This revealed little recent empirical research on resourcing matters when it came to training and development. The evidence-based literature on trends in training delivery methods, however, is vast, as is the literature on resourcing HR more generally. There were also many anecdotal accounts in practitioner journals relevant to a changing role for trainers. This all provided an initial basis for the project team to identify some of the likely issues. However, it was clear that resourcing practice for training and development is an area which still needs to be researched and explored.

Workshop

Second, a one-day workshop for IES 'Employee and Management Development' Research Network members was held in June 2001. The 15 participants were encouraged to share and debate their understanding and experiences of the relevant trends and issues within their own organisation's practice for resourcing training and development. This workshop allowed the project team to test the appropriateness of its pilot questionnaire and identify additional issues based on practice that had not surfaced through the literature review.

Survey

Third, a survey was conducted during the period September-December 2001, which allowed a wide range of training and development practices to be captured from a broad spectrum of large UK based organisations. Our survey sample comprised companies in the FTSE 250, and a selection of public sector organisations. The questionnaire sought information on the following areas:

- company profile
- the organisation of training and development
- outsourcing
- patterns in training delivery
- criteria for decision making in resourcing training
- size of the function, and spending patterns
- the role of the trainer
- skill emphasis for training and development staff.

A total of 101 completed questionnaires were returned, a response rate of 35 per cent. Industries represented by questionnaire respondents included retail, finance, manufacturing, energy, IT, hospitality, distribution and public services.

Interviews

Finally, in-depth interviews were carried out within six case study organisations during the period March-July 2002 to look more closely at the key issues that emerged from the survey. The main criteria for selecting the case studies was their different approaches to resourcing training and development, and their willingness to reflect with the research team on how changes in business strategy or training and development activity were impacting on how it is resourced.

All our case study sites have been given nicknames throughout this report. This is in order to provide some anonymity for those organisations that requested it. The nicknames we have given the case study organisations and a brief description of their business context is presented below.

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ServeCo operates in a mature and saturated market, dominated by a number of big players. Cost leadership is a sought-after position. Thus the company feels it needs to differentiate itself. An essential part of its pitch is its high investment in its people, who provide the services.

PhoneCo is one of the world's largest network operators. After a period of explosive growth in the 1990s, their market is now characterised by consolidation, take-overs and competitors with similar products and similar tariffs. This leaves customer service as one of the remaining sources of competitive advantage. The people, processes and skills to make good customer service happen are therefore a top priority.

EngineCo operates in a specialist market, which necessitates recruiting and retaining a highly skilled technical workforce in the face of pressure from higher paying industries. Employee development is seen as an important lever in skills acquisition and staff retention.

GovOrg has been in the vanguard of the Government's 'Modernising' public services agenda and has undergone a series of changes in service provision priorities and internal ways of working. It strives to be seen as a 'good employer'.

ElectronicsCo is a decentralised company with individual businesses setting their own strategies and objectives. However, the company as a whole is facing tough global competition and its overall values and identity includes a clear emphasis on innovation and technical excellence.

HighTechCo is operating in a rapidly changing global marketplace that is currently characterised by short product development cycles and over-capacity. Cost reduction has been a key business driver in the face of market conditions and a falling share price. Restructuring businesses has achieved economies of scale.

Within all six case study organisations, in-depth interviews were conducted with the person with overall responsibility for training and development within the organisation. These interviews were based on a broad common set of questions. Within five of the organisations we then conducted further interviews with two or three members of the training function and senior managers to explore in more detail one particular issue or activity, these issues being different in each case study organisation. In total we conducted 15 in-depth interviews.

1.3 Structure of this report

The structure of this report is as follows:

Chapter 2 looks at the changing business drivers for training and development and the positioning of training and development within the business.

Chapter 3 provides a brief overview of some of the trends in delivery methods, the issues raised by these methods, and their impact on the training and development function.

Chapter 4 provides a no-nonsense description of the different organisational structures that can be adopted, and the practical implications on the organisation and the function, of choices in structure.

Chapter 5 examines what the changing nature of the training function means for the job roles of trainers. It also offers a model of how some of the emergent roles can be seen as broader role clusters.

Chapter 6 looks at the skills that will be demanded to enable training and development staff to work in the way that these new roles will require.

Chapter 7 reflects on how the challenges of the future for the function will be resourced. It also reflects on issues affecting career paths into and out of the training function.

By way of conclusion, **Chapter 8** reviews the main findings and issues arising from the research.

For those with an interest in research methods, further details about the profile of survey organisations and case study organisations are included in the appendices.

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2. Business Positioning of Training and Development

We start by looking at the nature of the demand for training and development in organisations. Drawing on the experience of the research project workshop participants and the literature, we will outline some the business drivers for training and development and the implications for training functions of differences in business need. We also outline the location, size and spending patterns of current training and development functions, drawing on the findings from the IES survey. Finally, this chapter considers what our case studies tell us about aligning the function with business strategy.

2.1 Business drivers

2.1.1 Routine business needs and the demand for training and development

The context in which organisations operate has some important consequences for the training and development function. Business priorities are changing in all organisations in response to a range of pressures – be these from the market, new technologies, global competition or increased pace of change – or the challenge of delivering better value in the public sector. There are many drivers for training and development and many of these are business drivers. For instance:

- Some are statutory requirements borne out of regulation and professional bodies that specify training requirements. For instance, money laundering awareness training is a legal requirement for many staff who work in companies in the

financial services sector. In the hospitality sector, the provision of food handling and hygiene training for many front line staff is similarly an imperative. At one level, therefore, delivery of this training is essential in order that these companies can 'tick the right boxes'. Regulation is likely to increase in these sectors rather than decrease.

- Technical and product training is very important in many sectors, since staff need to know about the company's products and how to use them in order to sell them and/or be qualified in operating them. One could argue that 'the show stops without it' in key processes such as sales and manufacturing, so delivery of this type of training is vital to meeting business needs. This type of demand for training is also likely to continue.
- Some 'generic skills' training is again often business driven. For example, in many service sectors and all modern customer call centres, customer service is not possible without the provision of IT or systems training, or at least customer service is severely compromised in the absence of such training.
- There is some other development provided in order to support and enable career movements. Much training of so-called 'high potentials' would come into this category, whereby organisations seek to ensure they have a pool of individuals on tap within the organisation ready and waiting for when more senior posts need to be filled. Although this type of training could be said to benefit both the individual and the organisation, it is mainly provided in response to clearly defined business drivers and to ensure the organisation will have the right people with the right skills at the right time.
- In some circumstances, it could also be said that various employee development provisions fit with the organisation's goals. This occurs in a highly competitive labour market categorised by low unemployment, so that employers have to compete harder to attract and retain key staff. Development opportunities can sometimes form part of the recruitment and retention strategy for these key staff.

These aspects are all reasons why the business needs training and development, but they are principally about the quantity and quality of training delivery. Despite the prediction that these demands will continue to increase, it is easy to see why much training has been considered transactional. So what about more strategic business needs?

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2.1.2 Senior management as customers

Training journals in the US and the UK regularly urge those in training functions within employing organisations to adopt a more strategic approach. Being 'strategic' is often defined as linking training activity to longer-term strategic and operational goals, and thereby maximising the added value of the function (Brelade 1999, and Peak 1997). By developing a training strategy, it is argued, there is less emphasis on routine (or traditional) training activities and more emphasis on integrating training activities into business and HR strategy. This perspective effectively positions senior managers as the customers of the training function and seeks to position training as transformational.

There was a degree of consensus at the project workshop about the need for senior managers (especially Board members) to take responsibility for specifying training and development needs and then the training and development function providing the service they demand. At one extreme this might be seen as a: *'you ask, we deliver'* position for training and development. At the other extreme it might be viewed as a partnership. It can be a very useful exercise to ask senior managers how they perceive the role of the training function and then compare this to what the members of the training function may desire for their role. This exercise will provide an indication of the size of any gap in perceptions.

In some organisations this top-down view of senior managers as the dictators of demand is quite explicit, with executives as the people who say what the business priorities should be, and T&D seeing itself as professional providers to meet those needs. In these circumstances a critical issue is about T&D getting into the dialogue early enough to influence and help shape the identification of what is needed. The aim is to create a partnership that proactively identifies and determines training needs that will support and reflect strategic objectives, rather than a traditional customer-supplier relationship.

2.1.3 Diagnosis of training as 'the solution'

According to the Training and Development in Britain survey (IPD, 2000) training needs are most commonly identified by line managers and employees. We also know that many organisations

see appraisal as the main driver for identifying and initiating individual development, which suggests that this training is related to individual job-related requirements (Strebler *et al.*, 2001, Thomson *et al.*, 1997). But are these the right people using the right mechanism to be identifying training need, and thereby fuelling the line managers' and employees' demand for training and development?

Some of our research participants were concerned that managers can sometimes be instrumental in creating the illusion of demand for training by deciding that a 'course' is the solution to a business problem. Once this decision is made, the training can just flow through, sometimes automatically. The main problem with 'training as the solution' being imposed, is that often training cannot ever solve the problem, or can only hope to be part of a wider solution. We were told that where such a misdiagnosis has been made, it is hard for trainers to persuade senior managers that this is the case.

In some organisations the training function perceives itself as bridging the gap between what is imposed onto the organisation from outside and meeting the organisation's need. It attempts to do this by positioning what is imposed from outside and extending the training actually provided in such a way as to meet genuine needs. This is particularly the case in central and local government. But our research workshop participants considered that was not ideal, as there is no real demand for the training from senior management or anyone else within the organisation.

2.1.4 Individual employees as customers

In some organisations there is also a bottom-up approach in that individual development needs (usually identified through discussions with line managers or through personal development plans) are pooled into business unit plans. This means managers need to be able to understand the role of training in the organisation, and be able to relate individual needs to those of the business. It also means, in many cases, that individuals are expected to take a significant responsibility for taking their own training and development forward in response to opportunities offered.

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It was clear from the organisations represented at the project workshop in July 2001, that some were experimenting with a range of roles to improve their bottom-up approaches. For instance, one was trying to provide 'learning bags' for busy senior managers, consisting of very small training materials (intranet based) from which they can get something useful in just ten minutes on a pressing issue/problem (*eg* dealing with a grievance). Another organisation was creating a 'learning zone' to provide electronic space for generic materials that individuals can use for themselves.

It is not clear why all organisations support the training they do, because there are very few apparent links with business needs. Some provision and support for individuals may have become habitual. For instance, in one organisation the level of funding of educational qualification for individuals is high – and this is not because it forms part of a philosophical or strategic decision to support individuals (as in a formal Ford-style Employee Development Scheme). In these circumstances, trainers may be seen as administrators.

In other organisations, the individual is not just a player in a training needs identification process; they are the manager of their own training and development. This reflects one of the strongest strands in the learning literature over the last 20 years – the emphasis on the individual as a self-managed, self-organised learner. Tamkin *et al.* (1997) found that placing the responsibility for managing learning onto individuals appeared an attractive approach to organisations for delivering personal and career development needs in leaner times and devolved structures. More recently, the introduction of e-HR integrated HR systems and online self-service information systems has enabled employees in some organisations to interface directly with career/training and development planning tools, resources and appropriate delivery packages. In these circumstances the provision and quality assurance of user-friendly material becomes paramount.

2.1.5 Translation of business needs into clear training needs

There was an interesting debate at the project workshop about the *translation* of business needs such as 'customer service' into a

clear view of what was wanted. However, junior/middle managers ask for training in this area because they do not feel confident holding a team discussion about their performance in customer service. Is this because they don't know what the organisation really means by 'customer service'? In theory, working towards an Investors in People (IiP) award is supposed to help organisations do this kind of translation better. Some of this lack of confidence may be because people who work in policy/business planning are too far away from those delivering a service.

This raises the question of whether those identifying training needs should spend more time out in the business looking at people on the ground, not just making up lists and competencies sitting in HR policy offices. Senior managers may also have the same problem of distance from those whose training needs they are articulating.

2.2 A profile of training and development functions

2.2.1 Who manages the function?

A key question in this research was: 'to where does the training and development function report?'; *ie* from where is it ultimately managed? We asked this question in our survey.

Table 2.1 shows that the majority of responding organisations report to the Human Resources Director. Just under ten per cent of the respondents each reported to the Training and Development or Employee Development Director, or the Managing Director at business stream or unit level, although in each case, this is higher

Table 2.1: Training and development function reports to: (per cent)

	Private sector	Public sector	All
HR director	75	84	81
T&D or employee development director	14	6	9
MD at unit level	11	6	8
Other	17	16	16

Source: IES 2001/2002. NB Column percentages add up to more than 100 as respondents could give more than one answer

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in the private than in the public sector. Hence, although these responses show a high degree of centralisation in terms of its ultimate management, training and development is slightly more devolved in the private than the public sector.

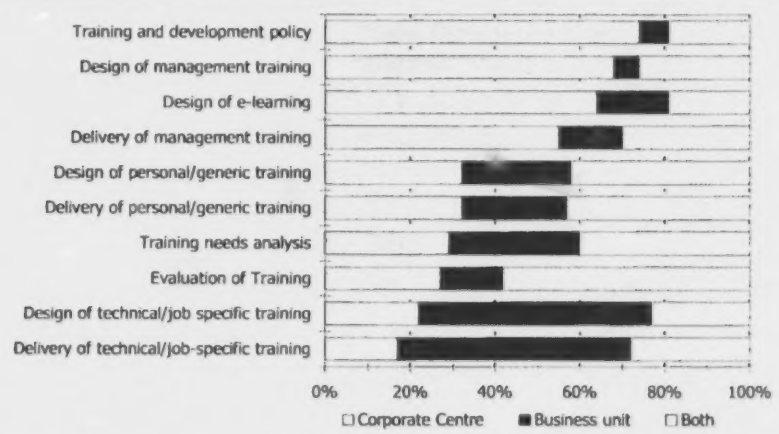
Sixteen per cent of respondents said that their training and development function reported somewhere else, and this included the Director of Support Services, Business Unit Leaders, Head of Corporate Policy and the Director of the Training Development Group.

2.2.2 Where is it located?

Related to the management of training and development is its location within the organisation. Survey respondents were asked where the staff supporting the range of training and development functions were located. The survey found that different 'arms' of the function were located in different places in the organisation. The results for all organisations are shown in Figure 2.1.

Policy formation, e-learning and the design and delivery of management training were the activities most likely to be carried out from the corporate centre. Conversely, the design and the

Figure 2.1: Location of training and development activities



Source: IES 2001/2001

delivery of technical and job-specific training were most often reported to be carried out at business unit or division level. Evaluation activities were most usually carried out by both the centre and the business units.

There was considerable variation by sector however, with the private sector generally being more devolved than the public sector across the whole range of activities. Public sector organisations reported a higher proportion of activity in the corporate centre alone on every activity, with the largest differences being found in the delivery of management training (69 percent compared to 28 per cent) and training needs analysis (41 per cent compared with eight per cent). Rather than training and development activities in the private sector being led by the business units alone, a mixed approach was in evidence, with staff being located in both the corporate centre and in the business units. This was particularly the case for evaluation activities, the delivery of personal and generic training, and training needs analysis.

2.2.3 What is its size and spending pattern?

The survey asked about changes in the size of and numbers employed in the training and development function, and trends in the way in which the budget was being spent. This was done firstly by asking organisations to think about the past three to five years, and then with regard to the future, *ie* the next three to five years.

Trends over the past three to five years

Figure 2.2 shows the overall trends in the size and spend of organisations' training and development functions over the past three to five years. No clear trends emerged in terms of the changes in size or numbers employed in the recent past, as organisations reported increases, decreases, and little change.

In terms of the total amount spent on training and development activity, as with the size of the function, the picture was mixed, with increases, decreases and no changes reported. Increases in spend were most often reported with regard to management development, culture change programmes, and spend on

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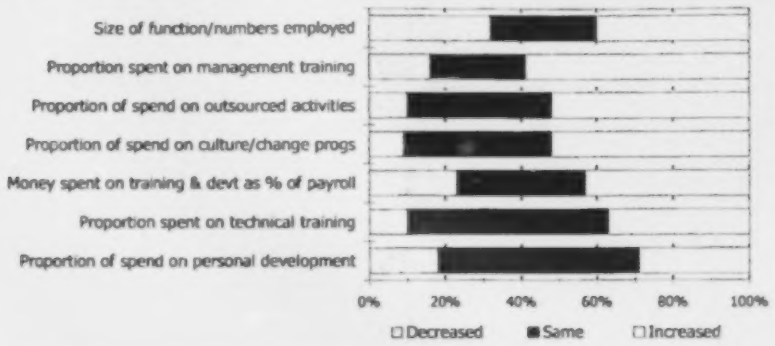
Figure 2.2: Size and spend, over the past three to five years



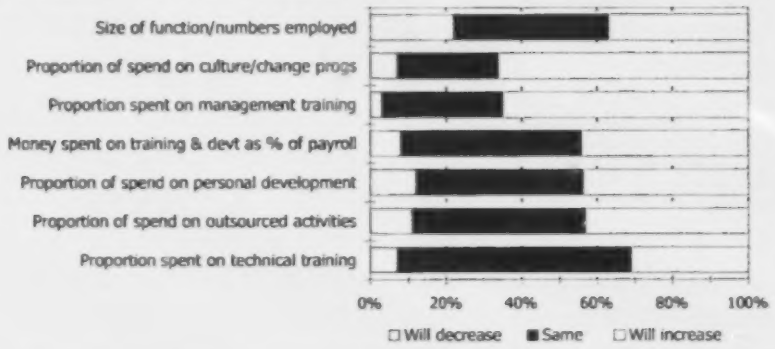
Source: IES 2001/2002

outsourced activities. By sector, the picture was again very mixed and no clear patterns emerged.

Predicted future trends in size and spend

Over the next three to five years, responding organisations predicted that there would be increases in many of the measures, but that in many cases, there would be little change (Figure 2.3).

Figure 2.3: Predicted future trends in size and spend over the next three to five years



Source: IES 2001/2002

Table 2.2: Size and budget predictions, by sector

	Private			Public		
	Will decrease	Same	Will increase	Will decrease	Same	Will increase
Size of function/numbers employed	34	38	28	15	44	42
Proportion of spend on culture/change programmes	16	28	56	2	27	71
Proportion spent on management training	6	27	67	2	34	64
Money spent on training & development as percentage of payroll	13	47	41	6	49	46
Proportion of spend on personal development	16	31	53	9	53	38
Proportion of spend on outsourced activities	23	39	39	4	51	45
Proportion spent on technical training	10	55	36	6	66	29

Source: IES 2001/2002

The largest predicted increases were for the proportion of spend on culture change programmes, and on management development. However, although small numbers of respondents predicted decreases, the majority felt that spend on personal development, on outsourcing, and the total spent as a percentage of payroll would either stay the same or increase. The proportion of spend on technical training was predicted to be the most static overall.

Although the pattern was again very mixed by sector (Table 2.2), some points of interest did emerge. For example, in terms of size, larger proportions of public than private sector respondents felt that the training and development function would increase, with smaller proportions predicting a decrease. There was also a larger predicted increase from the public sector on the money spent on culture/change programmes. With regard to personal development, the public sector is likely to be more static in terms of its spend, while more than half of the private sector organisations felt this was likely to increase.

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2.3 Relationship between HR and training

Training and development usually sits within a wider personnel function, especially in the public sector. This can distance the developers from senior management. Developers may desire to be more strategic and influential in taking forward a long-term change agenda, but if messages and strategy are filtered through a personnel function that is administrative and short-term focussed, this can be difficult to achieve. This raises an interesting question – if the HR team are not strategic, can the trainers and developers be?

In some organisations, developers sit in on the local management team meetings of the business units and this was thought to have a positive impact on the profile of training locally and the quality of its contribution. However, in one of the financial services organisations represented at the workshop, this is a relatively recent occurrence, so it is a bit early to judge the effect. Attendance is usually as well as, not instead of, the local HR advisor.

Reilly (1998) questions the need for a training and development strategy separate from an HR strategy, if the business and people strategies are to be truly integrated. It may be that this is a context-specific issue with no one 'right' answer. In an operating company where training is a key business issue, a training strategy may be vital, whereas in another, pay and reward or recruitment may be the key challenges and the need for an integrated strategy for people management may be more appropriate.

2.4 Aligning training with business strategy

We explored the concept of aligning training with business strategy with some of our case study organisations. What we found highlighted why such a diverse landscape of shape, size and structure of training functions has arisen. At the heart of the variations is not just the level of demand, but rather differences of:

- criticality of business need
- speed of response needed
- what the business can afford at any particular time
- the stage of development of the organisation 'life cycle'
- competitiveness of the labour market.

Case studies:

In **ServeCo**, staff training lies at the heart of its business strategy of differentiation, and scores high on criticality of business need. Product, sales and service training is planned and undertaken by managers and training specialists within each business unit. The idea behind this is to promote speed of response. Line managers take the lead on training. There are some corporate initiatives and management development training organised centrally.

In **PhoneCo**, staff training is at the heart of business strategy in the customer services division, although this level of priority is not necessarily the case in other business units. The training function is devolved to business unit level to ensure it is as close to the business as possible and therefore able to response quickly to business needs. The HR function on the other hand is centralised. Business unit managers are seen as the key customers of the training function, although the high specification career and training materials on the intranet supports employees in self-managing their own learning.

In **EngineCo**, learning and development is a central HQ function, whereas HR is located in business units as well as in HQ. However, the specialist labour market has been competitive and so technical skills and staff retention are important. Consequently it has been considered a worthwhile investment for there to be a senior manager with responsibility for employee development in each business unit. In general, managers take the lead on training, and employees are seen as the customers of that training.

In **GovOrg**, training and development is located and managed as part of a wider HR function. It has not been perceived as a high status or business critical support function in the past, although this is changing, reflecting government priorities on initiatives such as IiP. The whole function is now trying to move up the value chain and offer facilitation and advisory services rather than delivery. Managers are now being seen as the key customers, rather than employees.

In **ElectronicsCo**, training is decentralised, as is HR. Training is generally not seen as business critical. There is an integrated e-HR system, which enables employees and managers from all its businesses to access 'self-service' information relevant to development planning and learning, and this is managed as a central initiative.

HighTechCo judged that it could not afford the cost of a decentralised training function, because of market pressures and resultant downsizing and cost reductions. As a result, training is now a small highly-centralised function and manages multiple outsourced suppliers on behalf of the businesses. Traditionally managed separately from HR, the two functions are being brought together.

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In this chapter, we have outlined some of the business drivers for training and development, presented our survey findings on the location, size and spending patterns of the function, and raised some issues about alignment with business strategy. In the next chapter we take a closer look at some of the trends in training delivery methods.

3. Trends in Training Delivery Methods

This chapter provides an overview of the main trends in the delivery of training and development and examines the impact of these changing delivery methods on those involved in resourcing the training and development function. We start with what the IES survey and the literature show about the trends in methods of delivery, and then describe some of the issues raised by some of the newer methods in our case study organisations.

3.1 Survey findings on changing delivery methods

3.1.1 Summary of trends

Responding organisations were asked about the methods of training and development delivery that they were using now and, to get a sense of future trends, the methods that they felt they would be using over the next three to five years. The results are shown in Figure 3.1, with the largest predicted changes at the top of the table.

Overall, training was reported to be responsive, targeted, driven by business need and used to support organisational culture change. The majority of activities and approaches were already being extensively used. Notable exceptions to this included the use of the corporate university concept, the use of which is predicted to rise sharply over the next three to five years (for an explanation of the corporate university concept, see Section 3.2.4). Similarly, e-learning, currently being used by 76 per cent, was predicted to be used by all responding organisations within

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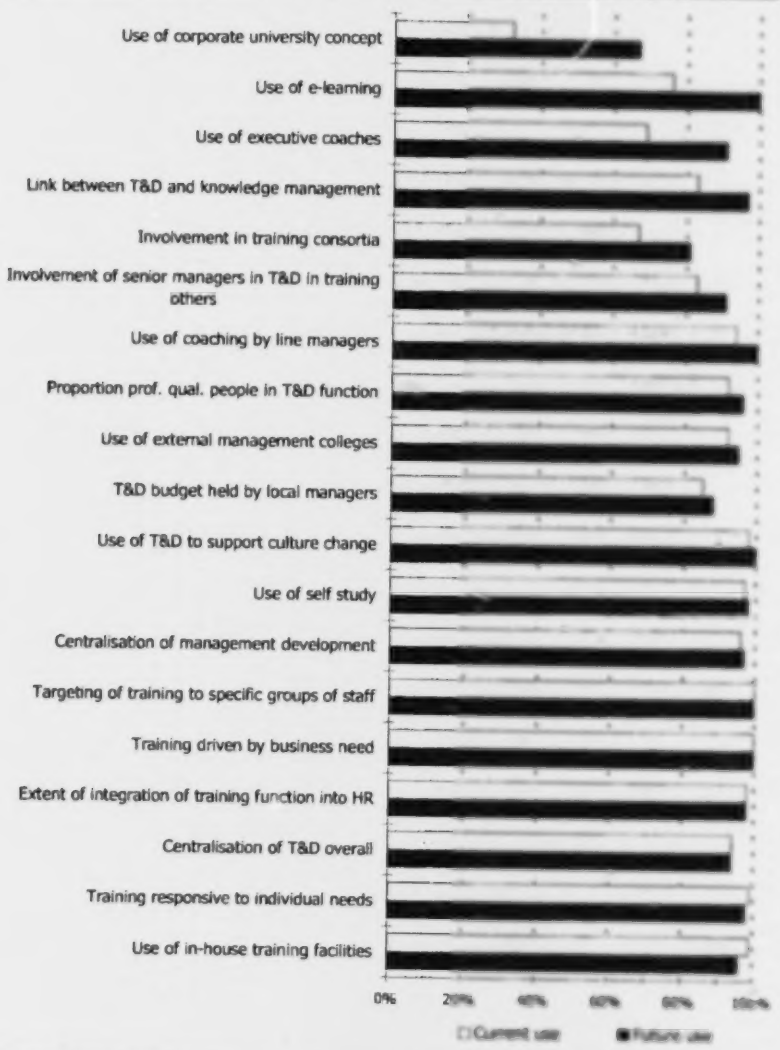
Figure 3.1: Current and future use of training approaches (per cent)


Use of corporate university concept
Use of e-learning
Use of executive coaches
Link between T&D and knowledge management
Involvement in training consortia
Involvement of senior managers in T&D in training others
Use of coaching by line managers
Proportion prof. qual. people in T&D function
Use of external management colleges
T&D budget held by local managers
Use of T&D to support culture change
Use of self study
Centralisation of management development
Targeting of training to specific groups of staff
Training driven by business need
Extent of integration of training function into HR
Centralisation of T&D overall
Training responsive to individual needs
Use of in-house training facilities
0%
20%
40%
60%
80%
100%
Current use
Future use

Source: IES 2001/2002

five years. The use of executive coaches, and involvement in training consortia, were also predicted to rise, as was the link between training and development activity and knowledge management.

Predicted decreases in the use of approaches were both uncommon and small, only being found in the cases of the use of in-house training facilities, and the provision of training, which was responsive to individual need.There were a few differences by sector. The use of the corporate university concept was currently being used more heavily by the private than public sector (58 per cent compared to 16 per cent), although this gap was predicted to narrow over the next few years (75 per cent compared to 61 per cent predicted its use).

External executive coaches were being used more extensively in the private than the public sector currently (92 per cent compared with 65 per cent). This trend was predicted to continue into the future, with 100 per cent of private sector organisations predicting their use, compared with 86 per cent of public sector organisations. The link with knowledge management was found to be stronger in the public than the private sector, and this was predicted to continue. Professional qualifications were slightly more common in the public than private sector, and it was felt that this would continue.

The overall centralisation of training and development was felt to be high across the private and the public sectors (91 per cent and 95 per cent), however, the private sector predicted a small decrease in centralisation (to 88 per cent), in contrast to the public sector, where a small increase in centralisation was predicted (to 97 per cent).

3.1.2 Criteria for adopting different methods

Respondents were asked to score a range of criteria that could be used when making decisions on how to meet their organisations' training and development needs. Whilst all the factors were felt to have at least some importance in the decision making process, some could be distinguished as having a greater impact.

At least 90 per cent felt that the following were important or very important:

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- cost
- quality and professionalism
- up-to-date ideas and information
- the ability to tailor to the organisation or group.

There were very few differences by sector in these measures.

At least 70 per cent of responding organisations also felt that the following were important:

- likely appeal to employees
- compatibility with the organisations approach.

In addition, at least 50 per cent of respondents also rated the following as important:

- ease of evaluation
- linkage to national standards and accreditation.

Some respondents gave additional criteria which they used in decision making about which delivery methods to select. These additional criteria included:

- track record
- cultural fit
- time constraints
- credibility and trust issues
- measurable impact on business indicators.

The biggest difference between the sectors was found in the case of a general preference for using outsourcing – this was much higher in the private than the public sector (46 per cent compared to 23 per cent).

3.1.3 Is the outsourcing tide turning?

Previous IES research on outsourcing (Reilly and Tamkin, 1996) identified that during the 1990s the range of activities outsourced widened greatly. Training was highlighted as one of the HR functions, along with recruitment, pensions administration and relocation services, that was most often being targeted by companies for outsourcing. However, they also identified that

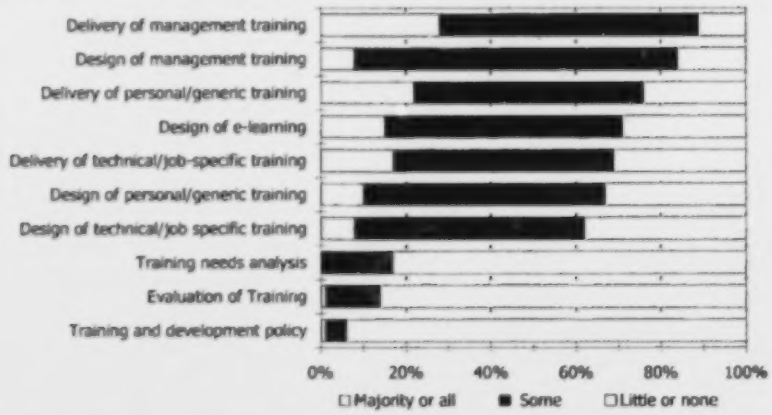
outsourcing often results from *ad hoc* pragmatic operational decisions rather than forming part of a coherent strategy. Other studies at the time confirm a sharp increase in the outsourcing of training, particularly among large organisations (Hesquet, 1995; Peak, 1997).

The 1998 WERS survey found that training was the most common HR activity to be undertaken externally (36 per cent), with payroll and recruitment being outsourced by 20 per cent and 11 per cent of organisations respectively (Cully *et al.*, 1999). More recently, research into HR shared services (Reilly, 2000) found that training support was among the items most commonly found in shared service functions.

For all the organisations involved in this project, a key decision in maximising organisational effectiveness concerns which aspects of training and development to outsource, and which to supply in-house.

Some interesting patterns emerged from the survey element of the research. As Figure 3.2 shows, the design and delivery of management training, together with the delivery of personal/ generic training, were the activities most likely to be outsourced to at least some extent. Activities least likely to be outsourced

Figure 3.2: Outsourcing of training and development activities



Source: IES 2001/2002

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were training and development policy, training needs analysis, and the evaluation of training. The design of e-learning, and job-specific training activities were most usually being supplied by a mixture of outsourcing and in-house activities.

Responding organisations most commonly reported using more than ten outsourced suppliers of training and development activities. Private sector organisations were generally both more likely to outsource, and to use larger numbers of outsourced suppliers than their public sector counterparts. The use of outsourcing by sector is shown in Table 3.1. One of the biggest differences is in e-learning, where the vast majority (88 per cent) of private sector organisations are currently choosing to outsource at least some of the designs, compared with only 60 per cent of public sector organisations.

Interestingly, the private sector, which has been using outsourcing more heavily than the public sector, shows some likelihood of decreasing its emphasis on this, with a few respondents predicting a decrease in the use of outsourcing. In contrast, public sector respondents predicted that their use of outsourcing would be similar or would increase.

Table 3.1: Outsourcing, by sector (per cent)

	Private			Public		
	Majority or all	Some	Little or none	Majority or all	Some	Little or none
Design of management training	11	77	11	6	75	19
Design of e-learning	19	68	13	12	48	40
Delivery of management training	42	44	14	21	70	10
Delivery of personal/generic training	33	44	22	16	59	25
Design of personal/generic training	17	61	22	6	54	40
Delivery of technical/job-specific training	25	44	31	13	57	31
Design of technical/job specific training	8	56	36	8	52	40
Evaluation of training	–	23	77	2	8	91
Training needs analysis	–	17	83	–	18	83
Training and development policy	3	3	94	–	6	94

Source: IES 2001/2002

Five of our six case study organisations had outsourced the majority of their training and development delivery several years ago and some of these arrangements are now seen as part of outsourced shared service centres for HR and/or other support services. Typically, the outsourced aspects included the design and delivery of classroom based training and, in most cases, the development and provision of e-learning materials and user support for e-learners.

However, in two of our organisations, recent moves had been made to pull much of the training and development activity back in- house. The reasons seemed to be that, despite the intended cost savings and consistency benefits realised from centralising, streamlining and outsourcing many transactional HR services, the responsiveness and quality of training and development had been adversely affected. In addition, in one of the organisations it was felt that the transformational opportunities that training and organisation development affords, had not been sufficiently well developed by those left inside the organisation after the function split.

A third organisation among our case studies expressed concern that the people who were in the outsourced delivery organisation are now closer to the business needs than those who remain inside the company. This is because they see the staff and managers all the time and are well connected into business issues. Those left inside the company are meant to be the business partners who anticipate business needs and act as high-level strategy-orientated consultants, but in practice they can feel isolated from the business. Because of time pressures they can end up more as mediators between the business and the outsourced suppliers or, worse, those who tidy up the contractual paperwork after the informal agreements have already been made between the other two parties. It may be that this is a rare result of a poorly formulated 'business partner' role.

Interestingly, the only one of our case study organisations that had not outsourced much of its training operations at all, did not start from the position of senior management viewing the training function as an overhead cost to the businesses. Employee development was already regarded as a business issue.

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3.2 Delivery methods in case study organisations

3.2.1 Coaching

We were not surprised at the high level of current and future use predicted by our survey respondents for coaching as a delivery method. The growth of coaching as a workplace development method has also been identified by other recent studies (Carter, 2001; CIPD, 2001; a Work Foundation survey, 2002). There are real challenges in how best to support the continued personal or self-development of employees; one-to-one coaching, along with personal feedback, have been adopted by organisations with enthusiasm.

Organisations resource one-to-one coaching in three ways, by:

- a cadre of in-house specialist coaches
- line managers coaching their own staff
- commissioning external suppliers as coaches (usually for senior managers or 'executives'.

Some organisations use a combination of these three different approaches. Our survey asked about the last two of these approaches and Figure 3.1 showed that both approaches are already popular. Particularly noteworthy was that in the private sector, 100 per cent of responding organisations expected to be using both approaches to training at least somewhere in their organisations within the next three years.

So what does a shift to a coaching delivery method imply for training and development functions? We consulted the literature and asked the organisations involved in our research project what, if any, changes it had meant for them.

The concept of the line manager as a coach of his/her own staff was a common one among our private sector case study organisations, so much so that it is easy to take it for granted.

In one organisation where the general philosophy is for training to be close to the job, line managers have effectively been acting as coaches for some time (although they may not have been called that). Line managers there actually deliver much of the training as part of their normal job, and trainers have coached

managers and supervisors for many years to develop their coaching and training delivery skills.

One of the companies in our research project workshop reported that the introduction of line managers as coaches was much more recent in his organisation. In both cases the implication for the training function was similar – specialist trainers tended to become seen as 'head coaches' or 'super coaches'. Their role became one of supporting the line managers in their coaching and they no longer directly saw any other employees in a formal coaching or development discussion. But what they also noticed was a rise in the status and levels of trust between managers who had embraced their new organisational coaching culture and their training colleagues, which in turn allowed the function to be taken seriously.

However, in practice, by no means all managers in the other organisations were yet operating in the way intended. As one of our interviewees described it:

> *'We introduced the concept of the team manager as a coach in one of our divisions over two years ago. But team managers are busy people. In order to make space for them to coach staff, we took away some of their administrative role – such as report writing and data analysis. But it all still feels very new to them.'*

The implications for training functions are somewhat different where coaching of individuals is resourced by means of an in-house cadre of specially trained coaches. Usually located as a central resource, this can become like an internal business, fuelled by the popularity among 'high flyer' recipients of the coaching. Indeed, in some companies it operates as a profit centre, with business units paying for the coaching services their staff and managers receive. Again, individual relationships between coaches and individuals they have coached, is a strategic asset that can be used to gain management support for other initiatives suggested by the training function.

When it comes to commissioning external suppliers of coaching, or executive coaching, the implications for the training function are somewhat different. As the term 'commissioning' implies, the training function's role here is one of procurement plus, possibly, quality assurance and evaluation. The close personal relationships are fostered between the coaches and senior managers and

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therefore do not obviously lead to improved communications with the training function. The impact of the coaching interventions may have extremely positive performance improvement outcomes but, despite having identified the need and the method and the supplier, this approach generally seems to have the least influence-building potential for the training function.

3.2.2 In-house training centres

We were initially surprised that in-house training centres featured strongly in three of our case study organisations. Our survey showed almost all organisations are using in-house training facilities to deliver at least some of their training. But of course, having a dedicated training centre requires an entirely different level of investment in both physical infrastructure and core staffing. There has also been a great deal of hype over the last few years about the closure of company training centres, so we were expecting hardly any to be left. However, our survey found 31 per cent of organisations having such centres, with only eight per cent who once had such a centre no longer having one. This is higher than the recent DfEE Learning and Training at Work study of UK employers of all sizes, which found that only 23 per cent of employers had their own separate training facilities (DfEE, 2001). So why did the large organisations we studied decide they needed their own centres? And what is the impact of having a centre on those involved in the training and development function?

In both **EngineCo**, which has a few very large business sites around the world, and in **ServeCo**, which has many small sites across the UK, the central training centres were relatively new replacements for previous less luxurious centres. Their training centres also have a dual purpose as they are used for training customers as well as employees.

One senior manager described his company's thinking behind investing in a new central training centre thus:

> *'The Executive Board wanted a "shop window" which would present our organisation to shareholders, the City and customers as a future looking company, which had confidence in its own future, and demonstrated this by investing in state of the art facilities. The message for employees was also clear: this company takes its employees seriously and is willing to make an important investment on their behalf.'*

One of the interesting distinctions we encountered was the key difference between using a dedicated training centre as an in-house training college and using it as a training facility. For instance, in one of our case study organisations, people from the business organise their own delivery and bring their own trainers with them when they 'book space' at the centre. In terms of resourcing, this organisation has trainers located in its various businesses and these trainers use their informal networks to share training materials and ideas. There is one dedicated business manager to run the centre. There is no corporate training function at all in this organisation, even though there is a state of the art corporate training facility.

With a dedicated training college, there is always the danger of perpetuating the expectation that training is about classrooms and face-to-face group based methods. There must surely also be the temptation to fill the classrooms, since the infrastructure is being paid for anyway and the marginal cost of a extra course is small. However, our case study organisations with such in-house centres/colleges challenged us about this assumption and defended themselves against this charge by saying that in practice that needn't be the outcomes. One interviewee told us:

> *'We do not do more classroom based training than before we had a central training central. Previously the company made much use of hired facilities or (more often) training just did not happen at all. The centre has encouraged more development activities to take place, and this is in line with company policy.'*

> *'Our aim is to provide a range of challenging learning opportunities and options for the business and solutions to training needs identified in the business. It would be wrong for anyone to get the impression that having bricks and mortar implies classroom methods predominate. Our job is to pay attention to the different learning styles of the target audience. Typically we offer a combination approach of classroom based, distance learning and workplace learning.'*

3.2.3 e-learning

According to previous research (Pollard and Hillage, 2001; Sloman, 2001), e-learning methods could account for one-quarter of all learning in organisations within five years. All our case study organisations had been investing in e-learning for some time. The rationales given for using the approach included:

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- learning access – to get more learning out to more people, especially highly dispersed field staff
- cost efficiency – to be able to deliver more training for the same money, or to save money
- support cultural change – to make the business more technologically aware internally in the context of wider e-business transformation, and/or to get staff used to not thinking of learning as being about classrooms.

The extent to which e-learning was integral to delivery varied among the case study organisations:

In **ElectronicsCo**, a 2001 internal review had shown only 0.7 per cent of delivery was using e-learning, and plans were being actively pursued to increase this up to a limit of 20 per cent of total training delivery. The plan is to make off-the-shelf packages and bespoke e-learning materials available in a devolved business where operating companies 'buy in' commercially.

In **HighTechCo**, a major investment and growth in e-learning infrastructure and applications across the board had been made over three years ago as a deliberate attempt to replace as far as possible classroom based technical training. Pollard and Willison (forthcoming 2003) might describe this as a classic 'replacement' approach to e-learning, which is no longer fashionable.

In **PhoneCo** and **EngineCo**, e-learning had become just one of a number of methods used in their 'blended learning approach' to delivering key technical and communications programmes. For instance, in six-week long induction training programmes for customer service advisors, online work and regular assessment is integrated with classroom based instruction with a whole-group trainer, 1:1 sessions with a coach, experiential work through simulated telephone calls and shadowing of existing advisors. Pollard and Willison (forthcoming, 2003) might describe this 'learning' approach to e-learning as now the most common.

Some of our case study organisations could be considered 'early adopters' of e-learning, and this study was particularly interested in the impact on the training function of using e-learning to deliver training and development. Untangling what can be attributed to e-learning and what to other changes going on in the business or the function, is always tricky. Figure 3.3 attempts to chart the implications for HighTechCo of several changes to delivery methods, the principal change of which was a major investment in e-learning.

Figure 3.3: The implications of changing delivery methods in HighTechCo

Drivers of change	Mechanisms of the change	Initial implications for T&D function	Possible future implications
Mainly costs + Integration + Centralisation	Outsourcing 'delivery' and 'management' of training Large investment in e-learning Reduction/ closure of central training centre	Major reduction in function staffing levels 'Contract managers' replacing training practitioners and managers of training activities Dispersal of T&D capability inside/ outside the function and the company Signs of pulling back from the businesses Associates are in isolating roles	Those leaving to go freelance might drift back, to work for the businesses New starters will come in at a lower level and deliver in the businesses (eg sales) Difficulties in making the contract manager & business partner relationships work Career ladders will change, trainers may have to cut their teeth in the business or with suppliers, not in the T&D function As confidence grows and cost of authoring e-learning packages drops, some development could be brought back in-house

Source: IES, 2002

When reviewing your own training function it can be useful to adopt this approach of 'charting implications'. It allows you to identify the likely resourcing implications of changes to delivery methods. It can also help to identify and prepare for the implications to career paths.

3.2.4 Corporate universities

According to Arkin (2000), in the UK around 200 companies are thought to have established corporate universities, and others are forming strategic partnerships with higher education institutions.

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Early pioneers in the UK included Unipart and Anglian Water in the early 1990s.

Our case study organisations interpreted the term 'corporate university' in different ways. For some, the term is specific and refers to the users of academic terminology to describe and raise the status of training and development and, perhaps, also implies a relationship with one or more 'real' conventional universities who co-design or accredit the company's programmes. For others, the term is interpreted more broadly as an umbrella that describes the creation and marketing of internal brands for all the learning and development opportunities an organisation provides. This diversity of interpretation is echoed by Arkin (2000), who identifies three more recent high profile adopters of the concept :

- Lloyds TSB who run their training function (called The University for Lloyds TSB) just as though it were a university, with faculties for each development area, with the aim of aligning training and development with business strategy and using the concept as an internal brand, letting employees know that it will invest in them.
- Cap Gemini Ernst and Young who have been working under the banner of its 'Virtual Business School' to incorporate new forms of learning, to help attract and retain employees.
- BAe Systems' virtual university, which has a strategic partnership policy, allowing them to co-design programmes with the help of conventional universities.

As previously mentioned, our survey showed that the use of the corporate university concept was predicted by respondents to rise sharply over the next three to five years. And yet our case study organisations were very reluctant to use this particular label, even though it clearly fitted some of the activities of at least two of them. This finding reflects what Dealtry (2000) found in their case study-based US and UK research, which was that the term 'corporate university' was a contentious issue. In some companies both 'corporate' and 'university' were considered unacceptable terms, as they imply centrally and academically driven dynamics.

In **EngineCo**, the label 'corporate university' was certainly considered 'too pretentious' as a description for their comprehensive series of ten professional faculties and five functional faculties (Figure 3.4), which comprise the company's preferred label of 'learning system'.

These faculties are line management led, and determine and develop educational arrangements, professional programmes and master classes, and networking opportunities for the specialist disciplines that have company-wide application and also programmes for non-specialists about their discipline. This means, for example, that finance faculty members are responsible for the curriculum of finance specialists, but also for the curriculum about finance which all non-finance specialists in the company need to know. The faculty infrastructure supporting the learning system took two years to develop, but now that it is up and running has led to:

- an increase in partnership working with academic partners, as each faculty has established a centre of excellence that provides senior line practitioners from the company to design programmes with academics
- a large increase in the amount of professional and managerial education and qualifications being undertaken
- an increase in the amount of money spent on professional training
- no increase in the headcount in the training function or the money spent by the function, as the system is fully resourced and run by the business units.

Figure 3.4: The learning system at EngineCo

Source: Company documentation, 2002

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3.3 The effect of changing delivery methods

The reason this study looked at the training delivery methods used by case study organisations was because we sought to determine the impact on training and development functions of changing methods. What we found was a somewhat complex picture with each organisation affected differently. However, it was possible to identify some different types of effect that occur as a result of introducing new delivery methods. All investments in new methods or changes in methods seemed to result in the following changes to the function:

- distribution and flow of money
- size, location and structure of the training function
- roles and skills, in-house trainers need to make the new arrangements work
- roles and skills that line managers need to make the new arrangements work.

The nature of the changes to some extent seemed to be determined by the new delivery method itself. To highlight this more clearly, let us consider two examples from the 'ends of the scale' in terms of changes determined by delivery methods popular with training and development professionals. Firstly, the introduction of e-learning as a delivery method meant the training function tended to need to operate a bit like a mini-business itself. This makes sense if you think of on-line training packages as products that need a production, distribution and sales infrastructure to get out in time to be useful, and be attractive enough to gain end user acceptance. Regardless of whether the actual design and production is done in-house or commissioned externally, the training function, or at least part of it, suddenly needs tougher, more commercial skills, than it has been traditionally known for to make this delivery system work. As one interviewee put it:

> *'Once the IT infrastructure is in place, e-learning is all about churning out and flogging content and packaging to the businesses.'*

Secondly, consider the introduction of all line managers as coaches, which is completely different in nature. This method means the function needs to get much closer to the line and,

ultimately, hand over control of much decision making about people development to the line. There still needs to be an infrastructure, but this tends to operate much more as a partnership, with at least a part of the training function needing to become a supportive pool of professional expert 'head' coaches. As one interviewee explained:

> *'Implementing coaching is all about maintaining an ethos of personal and organisational learning – in other words it's about relationships and process.'*

These two examples might appear to be extreme. Certainly IES has encountered organisations that believe both positions can co-exist quite happily within a single training function. Recognising and acknowledging the differences seems to be important, as is recognising the need to resource and manage them differently.

This chapter has outlined the issues arising from changing the mix of *delivery methods* used by training and development professionals. In the next chapter we turn to *delivery models*, ie the way the function itself is structured and organised.

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4. The Challenge of Structure

This chapter focuses on the different types of organisational structure and form in development functions. We outline some of the difficulties organisations face with these delivery models, introduce the various types in use, and outline the implications for organisations of implementing them.

4.1 Difficulties with structure

What structure or model to adopt is a very difficult decision for organisations. In many cases the structure of the training function will have grown organically over many years, and may never have been seriously questioned. But the knock-on effects of widespread outsourcing and restructuring of HR functions over recent years have led, in many cases, to downsized and fragmented training functions.

It is no coincidence that IES has seen a recent upsurge in requests by organisations for advice and consultancy assistance in reviewing the effectiveness of training functions. This is partly because it is fashionable to consider ways of positioning all support services higher up the value chain so that the organisation gets more value for its money. Also fashionable is movement to a David Ulrich 'HR business partner' mode of operating. But the other reason for current interest in training function structure is that organisations are realising that there is something different about training services. They are starting to question whether what works for HR services is applicable for training services.

Some of the more practical difficulties we have encountered in determining the 'right' delivery model for training and development services include:

- deciding how to cut up the function into manageable chunks
- deciding which aspects are best kept separate and what best kept close together
- deciding where to locate 'advice'
- the importance of skills based planning
- where the 'best' people should go.

Cutting up the function

Perhaps the single thorniest issue here is whether to split off management development from development for everyone else. The Civil Service has traditionally organised itself into three separately managed aspects known as 'Senior Civil Service', 'Management Development' and 'Training'. A different basic approach would be that adopted by BP for many years. Their training function organised itself as one 'employee development' function with a subset focusing on managers.

Degree of separation

The biggest current debate here is whether the people undertaking training strategy and policy development activities should report to the same person as the people who manage the training delivery activities. The argument is that generally it is better for strategy and policy development to be separate. In this way it can keep its focus on changes in business strategy, skill requirements, and decision making about how future needs should be delivered. The counter-argument is that generally it is thought better for training delivery to be close to strategy, in order that it can respond quickly enough to changing demands.

Where to locate advice

Increasingly, organisations are less sure that training advice given direct to employees, or to managers about their employees, can be put successfully into a shared service help-line format, alongside advice on conditions of employment. It seems to work well once someone else has identified the training need and the

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nature of the advice is therefore about delivery options and availability. Experience seems to suggest that someone more local needs to have already had a conversation about training needs. Advice about training seems to be something line managers just can't be expected to take on entirely in the way they can performance management.

Need for skills information

Most organisations at one time or another have their own foray into skills audit and many attempt to build skills databases, talent pools and/or competency profiles. E-HR systems allow these attempts to start with the training and development records held. The bigger question, however, lies in identifying the training and development function's role (if any) in capturing, collating and reporting on skills information. The answer to this question affects the size and location of the administrative and management information task. If the training function has a major role in this regard, records may need to be held centrally, whereas if it is a management responsibility, records may be decentralised.

Who should go where

Central to this issue is the idea of reducing both the size of the central training function, and the duplication in business units, to the minimum possible, alongside 'getting rid of all delivery' to someone else. Whilst this is attractive from a streamlining and cost reduction perspective, gathering all the 'best' people into a small strategic central function often deprives business units of skilled help in communicating their business and training needs. For training to align with and support business strategy at all levels, there need to be skilful people available to all parts of the organisation.

4.2 The structure options

Over the years, IES has seen many different delivery models for training and development functions. In some cases changing from one model to another can feel, to those closely involved, a bit like just rearranging the deckchairs. Consequently, it is

important that, people understand the nature of the differences and the benefit any change in structure is intended to realise.

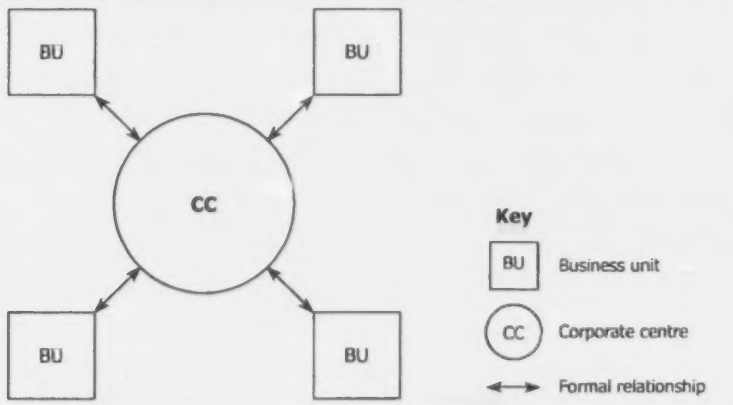
Our case study organisations had different approaches to form and structure, and most had adopted more than one delivery model in their structure. We can best explore the different approaches by looking at the way ideas about structure have evolved over time, and by representing the basic options visually in discussing each delivery model in turn.

4.2.1 The centralised model

In the centralised model (Figure 4.1) all training strategy, policy making, design and delivery for all staff groups is located in a fairly large corporate centre. There is very little activity out in the business units, with the possible exception of low-value technical and generic training delivery.

Although many training functions were originally born out of this centralised delivery model, it is now regarded as a rather old-fashioned traditional model of training and development. It still sometimes applies in the public sector, and can be found working quite well occasionally in the rare highly centralised large company that is based on a single geographical site.

Figure 4.1: The centralised model



Source: IES, 2002

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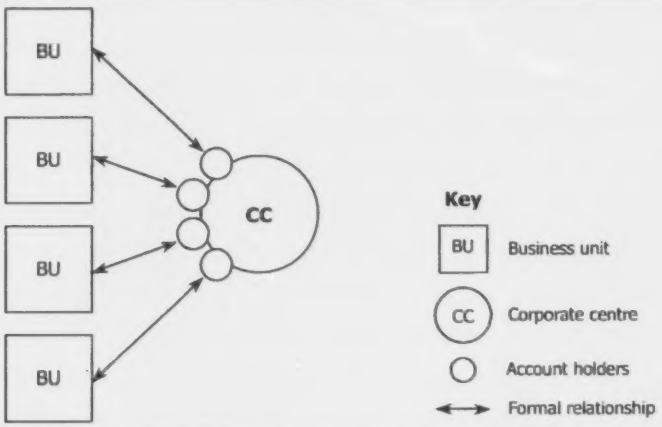
The main problem with this model is that it usually leads to the function being relatively unresponsive to diverse needs in the business units, and indeed unresponsive to the strategic needs of the whole business. In adopting this model, organisations should note that corporate training staff therefore tend to lack any real influence. This is especially so if the head of training reports to a head of HR who reports to another director (*ie* not to the CEO).

4.2.2 The key account holder model

In an attempt to become more business unit focussed, some training functions that have previously been in the centralised model, adopt a key account holder (or account management) model.

In this model (Figure 4.2) the function has a slightly smaller corporate centre that typically provides specialist advice on a range of organisation and career development matters. Management development activities probably also remain in the centre and, in organisations with large numbers of similar professional, technical or specialist staff, sometimes professional development activities remain in the centre as well. Facing outwards towards the business units are key account holders

Figure 4.2: The key account holder model



Source: IES, 2002

who work exclusively with one or more business units on issues of importance to them. These account holders deal with business unit needs identification, and the design and delivery of training (or commissioning of delivery), in collaboration with business unit managers. The reporting line tends to be back to the corporate centre, which is why these account holders are positioned in the model alongside the corporate centre, rather than between the centre and the business unit.

The advantage of a key account holder model is that the training function gets to participate in and influence business unit planning, and therefore respond quicker to demand. Generally, it also seems to lead to a more strategic orientation in supporting the whole organisation and each business unit, as well as getting senior business unit managers more involved in training and development.

Less positive aspects that IES has encountered, include tensions for the people undertaking the key account holder role who have to balance two different perceptions about what is important. Tensions also frequent emerge over who pays for the key account holders. The corporate centre often starts funding the account holder service as an extension of its core service offerings. Sometimes there is also a service level agreement. Over time, especially during periods of cost-reduction in central support functions, costs are attributed to business units and this can cause bad feeling.

4.2.3 The devolved model

In the more devolved model (Figure 4.3) the training function has a much smaller strategic core in the corporate centre, with the bulk of the training function operating as training and development teams, identifying training need, designing, delivering and evaluating training from within a business unit location.

This basic model is more common in large private sector organisations that locate relatively large chunks of the training function in geographic or business stream locations. In these cases, there is often a degree of informal networking that takes place between trainers within business units, together with the informal sharing of ideas and resources. Sometimes not everything is devolved.

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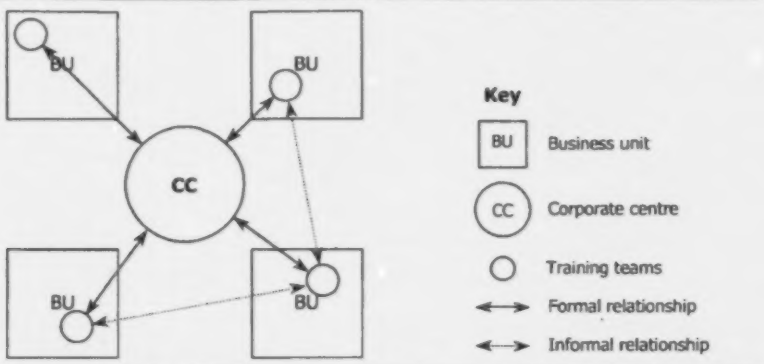
Figure 4.3: The devolved model



Source: IES, 2002

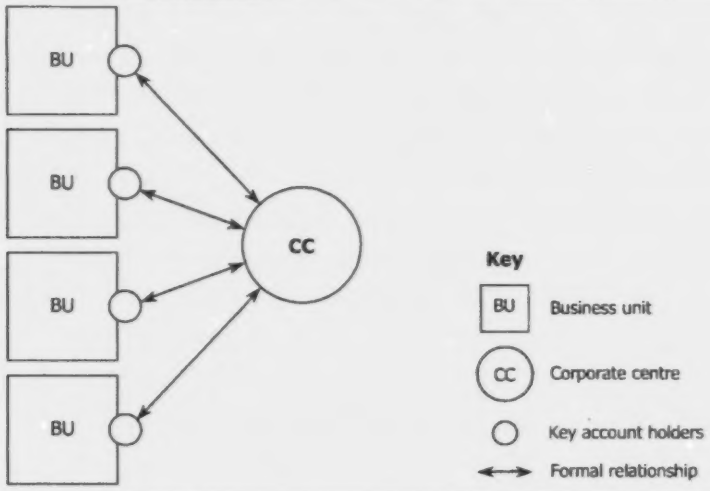
In practice, this more devolved model produces the clear benefits of a closer alignment of the function to business needs, better relationships with line managers, and offers trainers themselves more career pathways. However, organisations also tend to find that over time:

- training practices lack consistency as business unit managers want to go their own way
- some activities creep back to the centre (*eg* management development) and it tends to grow, with no decrease in the size of the training function in the business units
- tensions emerge over priorities, and relationships can become strained between those trainers who work in the corporate centre and those who work in the business units
- the head of training at the corporate centre often lacks strategic influence with senior managers in the business units, limiting their ability to impact on business practices and impose quality standards for training teams.

4.2.4 The business partner model

There is a philosophy about HR business partners that is much more than a role description. This can be confusing. What we are concerned with here is what a business partner model for the training function looks like. It may be helpful to think of it as just a variation on the key account holder model previously presented.

Figure 4.4: The business partner model



Source: IES, 2002

For our purposes of illustration, the main difference between the key account holder and business partner model is that in an account holder model, the account holders usually report to the corporate centre. In the business partner model (Figure 4.4) they report to each business unit. The advantage of this difference is that the business units are typically more accepting of administrative matters being their own responsibility to deliver and fund.

4.2.5 The shared service model

This model is usually seen as a progression from a devolved model, and is much less often adopted from a previously fully-centralised model. The shared service model is based on the simple concept of business units sharing common services, with the service users specifying the level and nature of the services they want. The model has proved very popular among HR and other support functions, and training and development functions have sometimes been swept along with the pack in organisation-wide adoptions of this delivery model.

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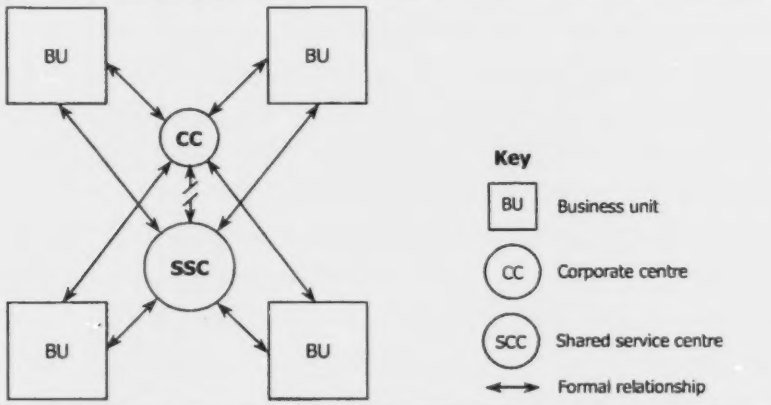
Figure 4.5: The shared service model



Source: IES, 2002

In this model (Figure 4.5), there is a clear separation made between those training and development activities regarded as 'transactional' (typically design and delivery of training, and sometimes advisory services as well) from those activities regarded as 'transformational'. Training administration (and sometimes advice on training policy and opportunities to employees and line managers) is dealt with from the shared service centre, either as a telephone helpline service akin to a call centre, or utilising an intranet, or as part of an e-HR integrated online system. Those in the corporate centre focus on high added value training strategy development, OD and change management. In some organisations, the training function quits the business units entirely, but in others a key account holder remains to give advice to senior business unit managers on organisation development and change management.

The jury is still out on the success of a shared service model when it comes to training and development. On the positive side, some companies have indeed managed to cut costs by reducing the total number of people employed in the various pockets all connected with the training function, although for other organisations, the significant investment in technology needed to make this model work well has meant an overall nil effect on cost. Other advantages of this model are:

- greater attention being paid at the corporate centre to higher value strategic aspects of training and development through the refocusing of resources
- improved administration related to classroom courses
- greater ease for employees in booking courses
- improved quality and access to management information, *eg* training take-up, and actions taken following no-shows
- better longer-term decision making regarding some training investment appraisal decisions, made possible through easier monitoring of process metrics.

On the negative side, we have encountered a number of common concerns. These include:

- resistance to the model from training and development professionals who fear training advice being devalued and provided alongside procedural advice on how to claim travelling expenses – whereas they perceive it as a high level diagnostic activity
- employees and line managers feeling abandoned and neglected when technology depersonalises the service, in comparison to sitting down next to someone
- lack of a direct feedback link from training deliverers to strategists which, over time, seems to make links between corporate centre and business units less effective. This is particularly the case where there is no business partner role in the business units and former colleagues/contacts in the business units have all moved to the shared service centre or outside the business altogether. This raises the important issue about the long-term impact of separating transformational activities from training delivery.

4.2.6 The outsourced model

As we discussed in the previous chapter, outsourcing aspects of training and development has been with us for some time. This is usually seen as a progression from a centralised model, although individual business units (within a devolved model) have also been known to adopt this model in relation to their own unit. In this model, non-core elements of the training and development function (often the transactional aspects of administration and training design and delivery) are contracted out to specialist organisations. Sometimes the identification of training need and

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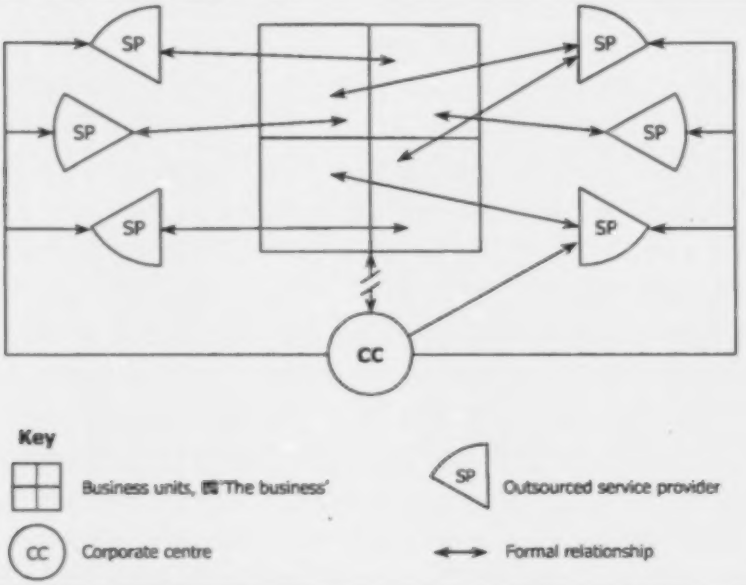
Figure 4.6: The outsourced model



Source: IES, 2002

evaluation is outsourced as well, although the latter is less common. The driver for much outsourcing of training delivery has been to cut costs, offer specialist provision to the business, and allow the remaining aspects of the training function to concentrate on more strategic training and development matters.

When adopted as a dominant delivery model in terms of form and structure, the outsourced model can be represented as in Figure 4.6. In adopting this model, the corporate centre frequently acquires the commissioning and procurement activities. They may also acquire the ongoing contract management, quality assurance, and evaluation activities as well. In the shared service model the business units specify the level of service they require from their shared service. In this outsourcing model, the corporate centre usually takes on a much more formal and time-consuming role of commissioner and manager of a whole series of outsourced service providers.

As discussed in Chapter 4, there are disadvantages to this delivery model, especially if there are multiple outsourced service providers. In practice, it seems to have been adopted wholesale most enthusiastically as a significant migration from the centralised model outlined in 4.2.1. It can be seen as a way of 'getting rid' of the delivery arm of training and development by taking it out of the internal function and making it someone else's problem! We have encountered organisations that are now concerned about the loss of organisation-specific knowledge, and the loss of 'entry points' into the organisation for discussions with the business about training strategy. Making this model work also requires considerable commercial skills in the corporate centre to manage the outsourced suppliers. Many training professionals moved out of the organisation to join the outsourced providers, reducing the pool of talent available to move into the strategic roles as they became vacant.

One of the key questions raised by this model is that of service users and the degree to which services commissioned respond to employee and line manager user needs. Over time, the relationship between the corporate centre and the business units can become distant or even break down, especially if the commissioners do not have a training delivery background. A related concern is that the outsourced service providers have a more direct link into the business through their delivery channel, and can end up agreeing future service provision with the business, which the centre is expected to organise. This can create a conflict with the more strategic priorities the corporate centre is agreeing with senior managers.

4.2.7 The stakeholder model

We do not present this final model as 'the answer' to form and structure for training and development services. Rather, it reflects three important developments we encountered in discussions with research participants about structure. These are:

- the opportunities offered by a web-enabled training and development process
- adopting a mix-and-match approach to structure, by adopting a variety of models to operate alongside each other
- paying much more attention to the different types of user of training services.

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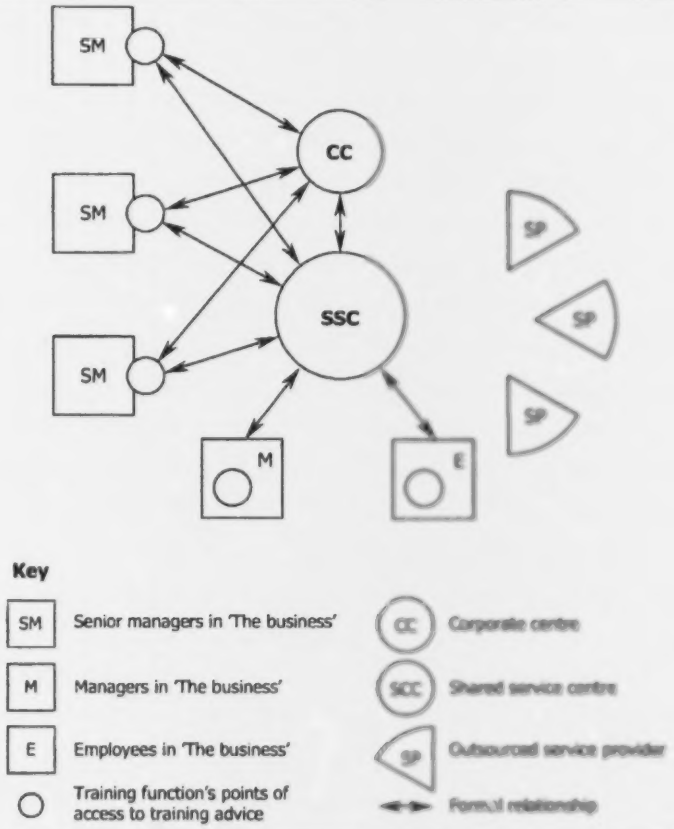
Figure 4.7: The stakeholder model



Source: IES, 2002

In Figure 4.7 this model includes: a small corporate centre focussing on transformational training activities; a separate shared service centre focussing on transactional training activities; an account holder from the 'business partner' model focussing on advisory training services; and the use of outsourced specialist training providers to deliver additional services as and where required.

In Figure 4.7 line managers and employees are recognised as having slightly different needs. Services within the shared service centre are directed specifically at the user group within all business units. Senior managers within the business can also access the shared service centre, but they also collaborate with the corporate centre on strategic matters, and benefit from an account holder to assist them in training strategy and advice relevant to their own business units.

The introduction of e-HR and employee self-service systems is having implications for the extent to which training and development functions think about delivery models. The benefits of a web-enabled training and development process are partly about more consistent, effective and streamlined administration across the organisation. This supports the shared service centre model. However, those organisations going down the 'people portal' route often see interaction with their employees as a key part of a wider employee relationship management strategy. These organisations use the technology as a communication tool regarding the learning and development goals the organisation wants the employee to share in. These systems can present a different training and development proposition, according to who the employee is and where they are in their career with the organisation: *eg new entrant, nearing retirement etc.* The distinctions may be viewed as somewhat superficial, but this may be because training and development professionals have so far had limited input into all this employee relationship management activity. As far as structure is concerned, however, the early indications are that web-enabled training and development processes are making it more realistic to allow some aspects of training and development to be transferred and owned by employees and managers.

4.3 Summary of key issues

In this chapter we have outlined some of the challenges of structure and the delivery model options when it comes to training and development functions. Key issues have included the need to consider:

- the effect on relationships with business unit senior managers and line managers when changing reporting lines and structure

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- the popularity of separating transactional training provision, from transformational strategy and policy development, together with the need to confirm the degree of separation
- the need to consider the location of training advice, which unlike significant amounts of HR advice, is not procedural and administrative and perhaps is therefore not best perceived as transactional
- the subtle difference between key account holder models and business partner models, which can have a big impact on the nature of the discussions with business units and what can ultimately be achieved. Key account holder models can, however, be a useful stepping stone into business partner models.

In the next chapter we examine what impact the different structures for training and development functions have on the job roles of trainers.

5. The Changing Roles of Trainers

As we have seen in the previous chapter, the structural form of the training function is attempting to respond to multiple demands, in particular to the ability to be both strategic and operational. Its aim is to ensue that training drives the business forward, as well as responding to the specific needs of local managers. In this chapter we examine what the changing nature of the training function means for the job roles of those who work in this function inside organisations. We start with what the IES survey showed about these roles, and then describe how some of these trends were visible in training roles in the case study organisations. We suggest a model of how some of the emergent roles can be seen as wider role clusters.

The literature on the training function has tended to highlight the growing importance of working close to the line in what is variously termed advice, consulting or business partner mode (IPD, 2000; Tamkin, Barber and Dench, 1997). Harrison (1997) sees the roles of internal consultant and strategic facilitator as adding onto more established roles of training provider, training manager (controlling direction and resources) and change agent. Likewise, Darling, Darling and Elliot (1999) see the increase in a consulting/ advisory role as adding on to the delivery of training or development (other activities including coaching *etc.*), managing the demand for training, and administration (including subcontracting).

How did the IES survey and case studies help to build a picture of the varied roles of individuals in training functions?

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5.1 Survey findings on role change

The IES survey asked organisations which roles of training staff they felt were becoming more important and which less crucial. The list of roles presented to those completing the questionnaire were a mix of those dominant in recent literature (facilitator, change agent, strategist *etc.*) with some roles defined around specific tasks (*eg* business planning, design, training needs analysis *etc.*). Figure 5.1 shows that the majority of respondents predict that training will need to take on an increasingly wide variety of roles.

- the trainer as a facilitator
- as organisational change agent
- as policy strategist

were the roles with the clearest predicted increase in importance, followed by :

- evaluation
- business planning.

The following roles were also predicted to increase in importance, but to a lesser extent:

Figure 5.1: The roles of training staff in future

Source: IES 2001/2002

- training design
- outsourced services management
- external benchmarking
- training needs identification
- career development support.

The only role that was felt likely to become less important for training staff in employing organisations was the direct delivery of formal training – a reduction especially marked in the public sector. Aside from this, there were no significant differences by sector.

5.2 Roles in case study organisations

These general trends were echoed strongly in the case study organisations we visited. Three main changes were driving the kinds of roles we saw in practice:

- The shift within training delivery from classroom to blended methods has changed the role of those who still deliver formal training inside organisations. These roles now include personal and group facilitation as part of programme delivery.
- The development of the 'business partner' model – a phrase often used by the case study organisations, and a structure already examined in Chapter 4. The term 'business partner' can stand for both a philosophy (in which the training function is a partner to the line) and specific roles acting as the main point of contact for line managers. These roles are most often called training adviser or training consultant. The training adviser or consultant role also often includes 'OD', activities such as facilitating change management through events or working directly with individuals or teams.
- In some organisations, the outsourcing of provision or its placement in a separate internal business unit had formalised the split between those who provide or deliver some types of training, and those who set training goals, purchase training, and manage the service.

Although the survey showed training 'policy or strategy' to be of growing importance, it is less clear where this sits in terms of roles. Training policy is often set at multiple levels in the organisation, and there are key decision makers at the top of the

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organisation as well as more locally (Holbeche, 1999). At corporate level, there may be several posts concerned with prioritising training objectives and deciding how the function will operate. Often a head of training and/or HR director are involved here. But training policy is also set more locally, with major business streams in the case study organisations often having a high degree of control over what training is offered. Dialogues with board members and key line managers play a major part in setting training policy and, again, occur at a variety of levels. Policy for management training was often more centralised than that for other employee groups, and its delivery was also more likely to be in the form of company-wide programmes.

The examples below describe some of the specific roles identified in the case study organisations.

Local or divisional training or learning adviser

In **ServeCo**, staff are located in small sites across the country. Training advisers sit out in major business streams and look after a geographical patch or a number of larger customer sites. They work very closely with local managers to identify training needs and set up training events. Managers and supervisors do most of the training delivery themselves. Training advisers network with each other to meet shared needs.

A similar role of learning adviser exists in large divisions of **PhoneCo**. Advisers cover advice to the line, training design and some delivery. Other advisers work on core programmes, which are shared across business units, and also purchase major programmes from external providers.

Corporate training advisers and divisional employee development managers

In **EngineCo**, the main advisory resource is held more centrally. A small number of quite senior employee development managers work out in the business divisions, working with the line to identify training needs and then pull on the expertise of the central training team to meet those needs.

PhoneCo mixed the model of devolved advisers in its larger business divisions with a more central team servicing the needs of the smaller divisions.

Corporate training manager

In **GovOrg**, most of the training activity is devolved to major units. However, one part of the senior professional role at the centre is to check that longer-term corporate needs are being met. It is then a responsibility of this role to initiate training programmes in areas of strategic importance that local processes are not addressing. Business units then are persuaded to support such programmes.

A similar role has just been re-created in **ElectronicsCo** after the experience of moving all training into an internal services organisation. This resulted in training which met short-term needs recognised by the business units, but tended to neglect longer-term training needs. One person described this central role as that of 'intelligent customer on behalf of the whole organisation'.

Employees as trainers

In a number of case study organisations, managers, technical specialists and expert front-line staff are the main training delivers. This training covers products and services, but also business processes and behaviour towards customers. In such organisations, training activity is deeply embedded in the business and often supported by local training advisers.

In **PhoneCo**, large-scale training programmes are often run for all front-line staff in call centres to update them on new products or systems. To resource such training about ten per cent of front-line staff are themselves trained as 'licensed deliverers' of training. They then run training sessions for all the other staff.

e-learning manager

ElectronicsCo was implementing its first large-scale use of e-learning through a small central team charged with selecting the supplier, purchasing relevant products, then selling these to all business units. The manager of this process was predominantly a project manager working with both the business and suppliers. It involved considerable professional judgement in selecting suppliers and products, an interface with IT people (internal and external) and a commercial role in selling the proposed service into the business. The role also included quite formal evaluation in moving from the pilot phase to the eventual selection of a preferred provider and a range of packages.

Similar roles are often conducted by **management development managers** in their purchasing of external management training from business schools and other providers.

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5.3 Role variation between organisations

It is tempting to speak about the shift from trainer to business partner as though these roles will look the same everywhere. As illustrated above, the shift to a business partner model may be a common trend, but the resulting roles in the training function manifest themselves in different ways. Some of the reasons for difference appear to be:

- where the bulk of the training resource is located. Some of the case organisations had a very centralised training resource offering a service out to the business, some had most of the training resource embedded out in the business. In the latter case, trainers often mixed a delivery role with an advisory/ consulting role
- the degree to which training is outsourced. Where training is internally provided, the delivery role is often combined with needs analysis, design and evaluation. Where training is outsourced, those managing purchasing are also often covering needs analysis and some of the design and evaluation work, but this boundary is quite a complex one. It also introduces formal contract management as a new role
- the balance between major core training programmes and smaller scale bespoke interventions. In the former case, design and evaluation are often separate from the large numbers of people doing delivery, in the latter the boundaries may not be visible. Where large-scale programmes are delivered through e-learning, the design and development is often external to the organisation, although closely involving some internal players
- the involvement of other employees in training delivery. Where front-line staff, line managers or technical specialists deliver most of the training from within their current job roles, training professionals have a natural role in talking to the line about training needs and design, and often set up training events by pulling in appropriate resources from the organisation.

5.4 Clusters of roles in the training function

It seems from the analysis above that there are now some clusters of types of work (or roles) in training, all of which are important in different ways. The posts or jobs in a training function often cover more than one of these work types.

Most of the discussions during the course of this research identified the role of 'training deliverer' (meaning the running of fairly traditional courses and also, increasingly, the provision of e-learning solutions) from roles other than this. In some circumstances, training delivery also includes a commercial role – that of selling training provision to the customer. This sales role obviously exists commercially for external providers, but also often arises internally as the promotion of training products.

The 'non-delivery' aspects of training are harder to unpick. Figure 5.2 is an attempt to split out three clusters of roles which seem to sit within the 'non-delivery' aspects of training.

'Training manager' is suggested as a role cluster concerned with the leadership of the training function, its overall nature, direction and strategy, its staffing and staff development and financial management. It also covers dealing with the various stakeholders, including the management of external providers. Where training is highly devolved, much of this management function is carried out locally.

'Training adviser' is suggested as a term to cover a range of roles which seem to be growing in importance, especially in the business partner view of training. As training endeavours to work more closely with the line, more of the work of trainers has become concerned with advising line managers (at varied levels) on training and learning issues. This advice can relate to individual employees or to groups of employees or to specific business needs, so again can be a high level/corporate role and/or a much more intimate and local role. It often has a focus on helping line managers to see a clearer link between the training activity they request and the real business issues they are facing. Short and Oppengart (2000) remind us of the need for advising employees as well as line managers, and call this a 'learning counsellor' role.

Close to this advisory role lie aspects of delivering learning through being a *facilitator* of various kinds of events or interventions, often directed at supporting organisational change. Training staff are increasingly involved in being the facilitators of such events, working very closely with line managers. Some organisations have *'OD'* groups, which specialise in this role. In others, it is an increasing part of the work of a traditional training

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Figure 5.2: Role clusters within the training function

Source: IES, 2002

team. The term 'change agent' is quite often used in the literature for this type of role (Harrison, 1997).

The final component of the diagram is a role cluster we will call 'training designer'. This role is neither training management nor training delivery, but rather includes the critical bridges *between* the business need for training and its delivery. It includes analysis of skills (especially from a broader business perspective), assessment of the skills of individuals (*eg* by occupational psychologists within the training team), design of training and development activities, and quality control/evaluation. Traditionally, training professionals would have expected to cover all these elements as well as advice and delivery. As the delivery of training has become separated from its commissioning, key elements of the designer role have often gone missing, with a consequent loss of match between how the need is seen (often by the adviser) and how it is delivered. Where training is outsourced, the designer role needs to support the selection of providers or products by looking carefully at training content,

method and likely value. It is the training designer's business to know what development interventions actually work and for whom – the individual and the organisation. Evaluation is seen as an important role in a future training function, but can also slip through the net between advisers and deliverers.

As with the adviser role, designers are required at a range of levels from corporate to local. Even where case organisations were involved in IiP, the training design and evaluation function was often not present at the range of organisational levels required.

Of course the clusters in this model overlap to a considerable degree, but it is may help us to define the 'non-delivery' roles in the training function more carefully. In particular, it highlights the need for the training designer cluster. Strategic design of training (sometimes called training architecture) is not guaranteed by the adviser roles, which can become focused on local and short-term management demands and neglect the wider and longer-term business contribution of training (Tamkin, Barber and Dench, 1997). Littlefield (2001) gives a practical example in IBM of a clear distinction between the development consultant role (adviser in our terms) and the development specialist (designer).

A corporate training manager, looking at overall priorities and direction, can also find it difficult to ensure effective training coverage and quality in a training function which has been largely devolved to business units. Hence the need for some of the designer role at the centre of the GovOrg case to ensure that some corporate programmes were initiated to meet key gaps in training provision.

As we move into the next chapter of the report, on the skills needed by people in the training function, we should also notice that the training designer is really more of a training specialist than the training adviser (who may focus more on business issues), or the training manager (who is often a generalist). The designer has their main focus on the process of learning itself – an area where specific knowledge and experience may be important. Zahn (2001) emphasises that managers are looking for this kind of professionalism in the training function, especially in evaluating the quality of training.

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6. Changing Skill Needs in the Training Function

With important changes predicted for the roles of training and development professionals, what skills will be needed to enable training and development staff to work in the new ways that will be required?

Just as the main thrust in the literature is towards the adviser role, so the skills most often highlighted as of growing importance are those concerned with working as an adviser or consultant to line managers. These include: understanding business context and speaking business language (Holbeche, 1999); understanding business demands (Darling, Darling and Elliot, 1999); diagnostic capacity and influencing skills (Harrison, 1997).

A second set of skills emphasised in the literature are those concerned with the manager role: setting training strategy, systems thinking and strategic planning (Short and Oppengart, 2000) and strategic awareness (Harrison, 1997).

Knowledge required by training professionals is emphasised quite highly by the Occupational Standards for trainers. The IPD survey (2000) showed that knowledge of business objectives and people management were seen as important, with some of the traditional specialist skills of trainers (*eg* needs analysis, design) coming a little lower on their list of importance. Darling, Darling and Elliot (1999) emphasise that both business understanding and specialist skills are important.

6.1 Current and future skill needs: survey findings

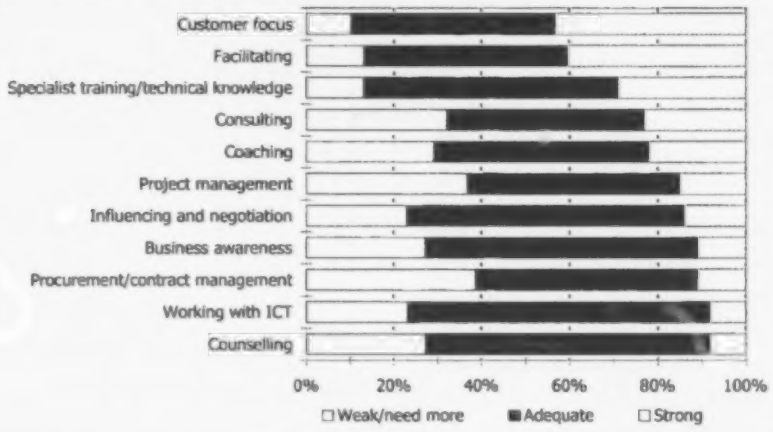
The survey asked respondents about the skills they felt their staff had now, and to what extent they felt that these skills would be needed in the future, *ie* over the next three to five years.

The current picture

Responding organisations felt that their staff were currently performing well with regard to customer focus, facilitation, and specialist training/technical knowledge (Figure 6.1). However, a few areas were highlighted in which they felt training and development staff needed more skills, or in which they were currently weak. These were procurement/contract management, consulting, and project management.

Looking at the private and public sectors separately, some differences were apparent. Private sector organisations were more likely than those in the public sector to need more facilitating skills (21 per cent compared to ten per cent); 44 per cent of the public sector respondents felt that they were already strong in this area, compared to 32 per cent of the private sector respondents. Conversely, the private sector felt stronger in

Figure 6.1: Skills of training and development staff at present



Source: IES 2001/2002

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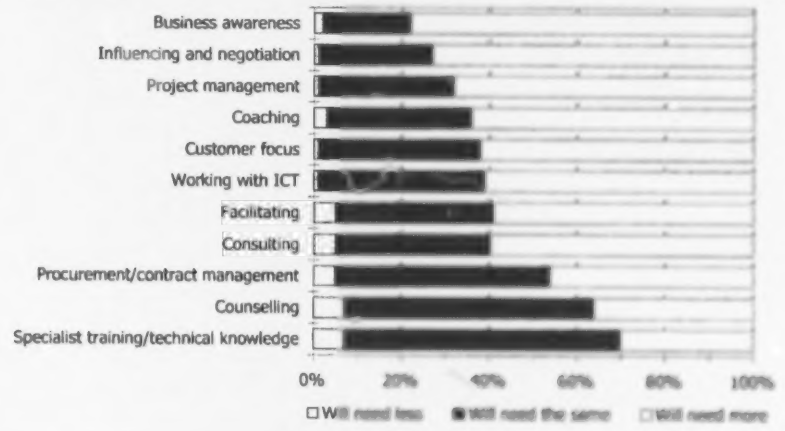
business awareness (18 per cent compared to eight per cent), although the majority in each case felt that their skills were adequate. Similarly, the public sector organisations felt slightly weaker on customer focus skills (13 per cent compared with six per cent were weak or needed more). Finally, responding organisations in the public sector felt that their staff needed more project management skills than those in the private sector (42 per cent compared to 27 per cent).

The future

Figure 6.2 shows how responding organisations view the future need for the same list of skills as above. Interestingly, very few felt that there would be a decline in the need for any of the skills listed; where they did, the largest proportions agreed that specialist training/technical knowledge, and counselling, would be needed less, but even in these cases, this was well under ten per cent of the total response. Far larger proportions felt that similar levels of these skills would continue to be required.

In general, organisations predicted that staff will need to be increasingly skilled in most of the areas, although the biggest predicted skills needs were in:

Figure 6.2: Skills needed by training and development staff in future



Source: IES 2001/2002

- business awareness
- influencing and negotiation
- project management.

In addition, over 50 per cent of the responding organisations felt that their staff would also need to be more skilled in:

- coaching
- customer focus
- working with ICT
- facilitating
- consulting.

Upskilling in these areas will help staff to meet the challenges of their changing and widening roles within the training and development function.

Other suggested skills that would be needed in the future included: creativity, personal networking, evaluation, career advice, equity and diversity, entrepreneurial skills.

There were few clear patterns apparent by sector, although the private sector respondents felt that they would need more influencing and negotiation skills than the public sector respondents (83 per cent compared to 68 per cent). The reverse was true in the case of procurement and contract management skills (29 per cent of the private sector felt they needed more, compared to 57 per cent of the public sector). Finally, the public sector respondents also differed from their private sector counterparts in feeling that more ICT skills would be needed (68 per cent, compared to 44 per cent).

6.2 Skill needs identified by case study organisations

Again the case studies largely confirm the kinds of skills emerging as important in the survey. Some of the ways these skills were manifest in the case studies are outlined in the box below.

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In **GovOrg**, business understanding and influencing in the area of training needs analysis were key: *'the need to come further up the line from afterthought to problem solver, and thence to early questioner about the skill needs of the organisation'*

Key skills identified by **EngineCo** for its adviser/consultant roles, and used to select which of the existing trainers could transfer to the new roles, were:

- flexibility, teamworking, and a positive mindset to help the business think through training needs
- expertise/depth of knowledge
- ability to influence change rather than react to it.

PhoneCo, in filling similar roles, looked for:

- knowledge of learning theory
- training delivery experience
- training design experience
- advisory and consultancy skills
- knowledge of the business.

In ElectronicsCo, which had been introducing e-learning, those in the e-learning team needed the following skills:

- project management
- ability to assess providers and understand their business models
- ability to assess packages
- influencing skills to secure senior support and sell the solution internally
- confidence in dealing with IT people as close working partners.

Several of the case study organisations increasingly recognised the need for some specialist/professional knowledge in the training function, especially in training needs analysis, evaluation, and in theories influencing training design.

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6.3 Skills and role clusters

If we look again at the role clusters identified in Chapter 5, we can see clusters of skills relating to them. Some of those mentioned in the survey and the case study interviews are shown below in Table 6.1.

Table 6.1: Skills needed within role clusters

Training manager	Business understanding and credibility
	Vision and ability to set overall direction and objectives
	Effective operational management, [redacted] budgets
	Managing boundaries ([redacted] with HR) and working collaboratively
	Selecting, motivating and developing the training community
	Managing contracts/relationships with suppliers
Training adviser	Business understanding and credibility with relevant line customers
	Customer orientation
	Consulting and influencing skills
	Facilitation/coaching/OD skills and knowledge
Training designer	Theoretical understanding of training/learning and awareness of trends in practice
	Training and skills analysis for business and individuals
	Design of training/learning interventions
	Project management
	Evaluation skills, including research and data analysis
	Ability to assess quality of suppliers
Training deliverer	Practical skills in delivery, including facilitation/coaching alongside traditional training skills
	Flexibility, willingness to change
	Selling solution to customers — asking for money

Source: IES, 2002

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7. Resourcing the Function and Career Paths

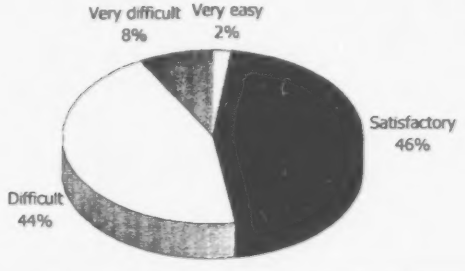
In this chapter we turn from considering what organisations want from their training functions to whether they can find the right people to work there. Given that the demands on trainers seem to be becoming more varied and more complex, we might expect to see some difficulties in filling the new training roles.

7.1 Recruiting into T&D: survey findings

The IES survey asked respondents about the ease with which they were able to recruit good quality staff and managers to their training and development function.

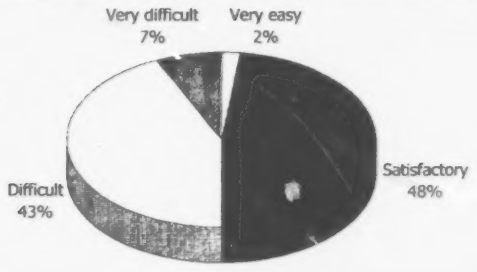
The ease with which responding organisations are able to recruit good managers is shown in Figure 7.1. A small minority finds it

Figure 7.1: Ease of recruiting good managers to the training function



Source: IES 2001/2002

Figure 7.2: Ease of recruiting good quality training professionals



Source: IES 2001/2002

very easy to find and recruit the staff they need, and almost half feel that the process is satisfactory. However, a similar proportion report finding it difficult to secure the good quality management staff they need, with a further eight per cent reporting that they find it very difficult. There were no significant differences by sector.

The picture for recruiting good quality training professionals is similar to that for managers, with half finding it at least satisfactory, but the other half reporting that the process is difficult or very difficult (Figure 7.2). Again, there were no major differences between public and private sectors.

7.2 Case study experiences of resourcing the function

The case study organisations see the resourcing issue in terms of a tension between quantity and quality. There is still no shortage of people with some training experience or of those keen for a career move into training, in part because of considerable numbers of ex-trainers in the labour market. However, there does seem to be a difficulty in recruiting suitable quality staff into the newer and more demanding training adviser type roles. Those with traditional training or education backgrounds are seen as lacking business understanding, advisory/consulting skills, and facilitation skills.

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Several of the case study organisations had been re-selecting and re-skilling existing trainers, who had been deliverers of formal training, for a move into adviser roles. Their experience was that some existing trainers made the transition well, albeit with some training input and a lot of encouragement. Other trainers really could not or did not wish to make the move. The perception was that understanding of the nature of the shift and having a positive attitude towards this change were very important in making this transition. Some people were simply comfortable with delivering training and did not take to the idea of the more advisory role. Some missed the positive 'buzz' of a successful event, well received.

Those organisations that had recently accessed the external market to recruit training adviser type roles, found that those with strong consulting skills were looking for higher salaries than industry or the public sector has paid for trainers in the recent past.

A couple of the case organisations found that those with the desired skill set were more likely to have been self-employed consultants than trainers for other major employers. Such people had broad business understanding and consulting skills and also the commercial experience to sell a service internally (especially when internal customers have to pay for it). However, they were expecting considerably higher salaries than those on offer.

Several of the case study organisations had recently raised their salaries for experienced adviser roles in order to overcome these recruitment difficulties. They had also spent several months in obtaining recruits of the right quality.

7.3 Future resourcing options

Partly as a consequence of resourcing difficulties, the case study organisations were often re-considering their resourcing strategies and possible career paths into and out of the training function. Some of the factors influencing this thinking were:

- the history of training as a second career for those with an operational or technical background, or people from personnel/ HR. So mixed resourcing policies have long been the norm, and provide a culture in which changing resourcing policy may not be difficult.

- the lack of fit between the new skills sought and those possessed by those who have been training deliverers for many years
- the increased involvement of line managers and other employees as trainers and coaches for others from within their current job roles
- the emergence of possible newer pools from which to find trainers. These include: those working as external training consultants, ex-employees with training experience and/or business-specific skills, a new generation of line managers with perhaps a stronger interest in training, other related professional groups that have developed (*eg* occupational psychologists)
- changes in the HR profession, the CIPD, nationally recognised training qualifications, sectoral provision for 'training the trainers', and relevant higher education courses (*eg* masters degrees in management learning).

There were some strong similarities in the way very different case study organisations were now thinking about the resourcing of the function. These included the:

- desire to re-deploy the best of their current trainers into the new roles as an essential first step
- introduction of some new ideas and increased professionalism by recruitment into the function from outside. This recruitment was mainly into senior training manager roles and into training adviser/business partner roles.
- strengthening of business knowledge and credibility with the line by bringing line managers into training roles, especially as advisers, but sometimes also as training managers. This was seen as more of a future than a current strategy.
- development of a range of external providers, including: major suppliers for large-scale outsourced programmes or materials, smaller training consultancies with expertise in various skill areas, individual associates – quite often ex-employees. These were often strengthening the professional expertise of the function in the facilitator and training designer roles as well as augmenting deliverers.

There was a less clear view of the future relationship between working in training and a career in HR. Some commented that training has been seen in the past as a low status cousin of HR, so HR people do a stint in training. Sometimes training has also been seen as a 'cushy number'. There was a view that both these

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Table 7.1: Opportunities and risks of future sources of training staff

Source of supply	Opportunities	Risks
Existing in-company trainers	some will make the transition to new business partner roles	others may not make the move — likely to leave and perhaps move into training provider organisations
External training professionals	should have facilitation and consulting skills and knowledge of training	but need to acquire business understanding, and are paid more than most in-company trainers
Line managers	may have the business knowledge and credibility for training management and advice	but need to acquire facilitation skills and knowledge of T&D theory and processes
HR managers	share some of the same skills, especially as advisers to the line	but do not necessarily have facilitation/ coaching skills, real business understanding or knowledge of T&D theory

Source: IES, 2002

attitudes are changing – training has gained in importance and is now a very demanding place to work.

There was also little explicit discussion of the choices to be made between people doing some training as part of their 'day job', people coming into training for short periods of time, and people working in the training function for a main part of their career.

The case study organisations shared some views about the risks and opportunities presented by the varied sources of supply, as shown in Table 7.1.

7.4 Developing the future training professionals

A final set of issues raised by the case study organisations concerned the availability of suitable infrastructure for offering training and developmental experience to those who enter training from such varied backgrounds. The key concerns were:

- a lack of appropriate high quality training for experienced line managers or technical people coming into training roles in mid-career. These people need very focussed knowledge and skill development to bring them up to speed quickly. ServeCo, for example, was concerned that the repeated upheavals in industry training bodies had weakened such provision.

- concern that the CIPD does not fully address the training needs of the training function, and that the predominance of distance learning as the form of study does not develop the practical skills required by trainers.
- the difficulty in future for those who enter the training function in a support role to be able to make the big jump to a professional training role. In the past, the career path from training support to training delivery was easier. In future, the high level skills required in adviser roles, the outsourcing of much delivery, and the increasing expectation of professional qualifications may make this career path much less accessible.

Overall, those involved in this study were more confident about the future challenge and attractiveness of a career in training than they were about suitable development being in place for those seeking to take up this challenge.

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8. Conclusions

The research project was initiated because there seemed to be considerable current interest in training and employee development methods, but a lack of research into the changing nature of the training *function* in terms of its purposes, structure and the people within it.

A function with a mission

The training function appears to be function in transition. In many ways it still sees itself as the poor cousin of HR, uncertain of exactly how to go about its work, and of the skills of its staff. On the other hand it is surer than in the past of the business need for training and development, and does not feel as though this case needs to be argued with the line. The HR function is often under fire for doing things that do not need to be done and telling the line what they are not allowed to do. Training is perhaps more obviously an enabling function and has a positive mission, albeit an extremely challenging one. Senior managers will not be forgiving of training functions that fail to deliver over the coming years.

Training is now a complex process ...

The delivery of training is becoming a more complex business. Personalised and informal learning is not replacing formal training but augmenting and enriching it. E-learning will also take its place in the range of useful approaches, but this looks likely to be a more limited and gradual change than originally foreseen. Outsourcing is old news to those in many training functions, and shared services still on a learning curve. What is

clear is that getting someone else to do your training delivery strengthens rather than removes the challenges of needs analysis, imaginative design and quality control.

... with many stakeholders

Training has many stakeholders. Line managers are the most obvious, although they still need much support in articulating their needs and working on solutions. As employees become more important decision-makers in regard to their own training, they are a key group of customers, often given little professional advice on how to think about or meet their own training needs. Neither line managers nor employees can be relied upon to see the future strategic training needs of the organisation as a whole, so in some sense the organisation is a vital stakeholder/customer in its own right. The challenge to the training function is to be able to reach right up to board dialogue and a truly strategic role, but also to keep its feet firmly on the ground, meeting the real current needs of local managers and employees.

Training still struggling to find effective structures

The research has shown a function struggling to find organisational forms that can help it meet these challenges. The rather glib use of the term 'business partner' does not of itself get us very far in inventing structures and roles that will address the varied demands made on the training function.

Neither has the considerable debate on the nature and structure of the HR function, helped the training function very much. The chain of activity from strategy to implementation is not the same in training and development as it is in, say, pay. Pay strategy and policy translate into pay procedures. Key decisions on individual pay are determined by these procedures and the judgement of managers. An administrative system pays money into a bank account. So the role of HR in pay is in policy, design of frameworks and procedures, advice to the line and administration. In training by contrast, strategy and policy are slimmer, needs analysis and design are much more situation-specific, and delivery is not through an administrative system but by a trainer, a manager, self-managed use of resources, or all of these together. It is clear, therefore, that training and HR need different structures, roles and skills.

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Roles are easier to see than jobs

In common with other researchers, we have found it easier to see a small number of key roles for training staff than to identify types of job or post. Any particular post-holder may carry a combination of these roles and impact at a range of levels in the organisation. The four role clusters we have identified are:

Training manager – setting direction and managing the service and the function.

Training deliverer – delivering training courses, programmes or products and supplying these to customers.

Training adviser – working closely with the line to identify business training needs or issues and how to approach them, and often also acting as facilitator.

Training designer – accountable for the detailed analysis of needs, designing training and development solutions to meet those needs, and evaluating the impact of training interventions.

The creation of more business-oriented advisers and the separation of delivery (into a shared service organisation or outsourced) has often left the designer role weakened. This may be what line managers mean when they say they want a more professional training function.

New career routes for new skill sets?

Organisations are not finding it easy to recruit people with the skills now required. The new breed of advisers is especially difficult to recruit, as they need broad business understanding plus a range of consulting and facilitation skills. HR managers share some of the same knowledge, but do not always have the range of training skills needed or an appreciation of the learning process. At this point in time it is unclear whether training is part of the 'personnel profession' or much more of an area of work in its own right, albeit sharing a national professional body.

Some organisations are re-thinking their future sources of supply for training staff, and starting to look more to experienced line managers as well as those with training or HR experience. Such line managers should have business understanding but need

access to professional development, which will help them acquire knowledge of training concepts and methods, and develop their facilitation skills.

What is clear is that those with the right skills – business understanding, facilitation, and design expertise – have plenty of opportunity to make a real contribution to business performance and the development of others.

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Appendix 1: Survey Respondents

Survey sample

The survey sample comprised companies in the FTSE 250, IES *Employee and Management Development* Research Network Members, and a selection of public sector organisations. It aimed to cover a broad spectrum of large organisations across the private and public sectors in order to capture a wide range of training and development (T&D) practices.

Responses were received from 101 organisations yielding a response rate of 35 per cent: a good response for a survey of this nature.

The respondents

- Half of the respondents were standalone organisations, the other half were part of larger corporations.
- Thirty-seven per cent were private sector, 63 per cent were public sector organisations.
- Eighty-two per cent were predominantly UK organisations, 17 per cent were international organisations with their corporate centre in the UK, and one organisation had its corporate centre outside the UK.

Size and sector

The size of the responding organisations varied between those with fewer than 2,000 employees, to organisations employing more than 20,000. Private sector organisations were generally larger than their private sector counterparts (Table A.1).

Table A.1: Size of responding organisations (per cent)

No. of staff	Private sector	Public sector	All
Less than 2,000	6	25	18
2,000 to 4,999	8	36	26
5,000 to 19,000	43	21	29
20,000 and over	43	18	27

Source: IES 2001/2002

Public sector organisations accounted for 63 per cent of the total response, but the private sector respondents represented a range of sectors, such as retail, finance and energy (Table A.2). The 'other' category shown in Table A.2 included hospitality, telecommunications, distribution, media, information technology and support services.

Table A.2: Sector of responding organisations (per cent)

	Private sector	Public sector	All
Manufacturing	14		5
Energy	19		7
Retail	19		7
Financial Services	24		9
Public sector		100	63
Other	24		9

Source: IES 2001/2002

Proportion of managers

Managers most commonly accounted for between ten and 20 per cent of the workforce amongst the responding organisations (Table A.3). The proportion of managers tended to be lower in the private sector, where they more commonly accounted for between five and ten per cent, which may also be linked to their tendency to be larger than the public sector organisations. In contrast, one-third of the public sector organisations reported that at least 20 per cent of their staff were managers.

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Table A.3: Proportion of managers (per cent)

	Private sector	Public sector	All
Up to 5 per cent	21	16	18
5 per cent to 9.9 per cent	38	13	23
10 cent to 19.9 per cent	31	38	35
20 per cent and over	10	33	24

Source: IES 2001/2002

Investors in People (IiP) status

There was a high level of engagement in Investors in People amongst the responding organisations, as shown in Table A.4. The Investors in People status of organisations may shape their training and development strategies and practices.

In total, 61 per cent of organisations had IiP status, with a further 15 per cent committed. However, IiP status was much more common in the public sector, with 88 per cent involved, compared with 54 per cent of the private sector respondents.

Table A.4: IiP status of responding organisations (per cent)

	Private sector	Public sector	All
Re-recognised	16	28	24
Recognised	24	44	37
Committed	14	16	15
Not committed or Don't know	46	11	24

Source: IES 2001/2002

Appendix 2: Overview of Case Studies

Case One: ServeCo

Business Context	Mature market Only growth through add-on services
Delivery Methods	In-house training 'facility'. The businesses bring their own trainers
Structure	Embedded devolved model Business partner/advisor model strong at unit level — training managers discuss with line and then sort out provision Some corporate initiatives and management training organised by the centre Centre needs to act to ensure core training.
Roles	Delivery nearly all by line managers
Skills	Training the trainers a huge issue
Resourcing/ Careers	Most done as part of normal job not as a career move Those who will be part of training function are a mix of training professionals (mainly externally recruited) and operational people (from inside and likely to move out again) Within businesses it is hard to find operational people with all round business knowledge, influencing skills, communication — training such people not well supported at industry level. CIPD mode of study does not help with the practical skills needed by trainers Also hard to find external people — did not pay enough to get skills needed Working with longer-serving trainers to move from delivery to facilitation role

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Case Two: GovOrg

Business Context	'Modernising Government' agenda is driving changes in priorities and ways of working
Delivery Methods	In-house management training college Contracts with multiple specialist suppliers
Structure	Centralised model. Managed as a subset of a wider HR function Training in general shifting from delivery to expert adviser/support to the line — parallels shift in HR generally
Roles	Training professionals mainly involved in strategy and advice — line managers and employees take over much of the mid level work, service delivery At centre, initiating training to meet corporate/longer-term needs — free market and local responsibility does not do this Training as 'intelligent customer' for the organisation — articulating requirements, knowing what kinds of activities needed and how they can be delivered, testing value for money
Skills	IiP has not necessarily increased business links/understanding Aspiration is to come further up the line, from afterthought to problem solver to asking early questions about skill need Need to be expert in learning and development — training needs, learning styles, and let go of interfacing too much with individual employee — becoming support to the line
Resourcing/ Careers	Central team mix of external and other public sector Sees T&D people having distinctive professional skills — not necessarily covering all aspects of HR. CIPD membership does not really meet their needs

Case Three: PhoneCo

Business Context	Market experienced explosive growth in 1990s, now replaced by supplier consolidation and search for competitive advantage
Delivery Methods	All key programmes (eg customer service adviser induction), utilise 'blending learning' e-learning and coaching and peer support and classroom tuition Introduced concept of manager as coach Extensive on-line provision to support self-managed learning
Structure	Partially devolved model. Focus for research: customer services division T&D devolved in large directorates but managed centrally for small ones HR managed centrally Some tension between T&D identify in large directorates but reporting into central HR
Roles	Training analysts — review events and adjust to needs of business Senior business partner role taken in going to business meetings (eg by training managers Learning advisers in large business division responsible for delivery — some do cross-unit work and purchase big programmes Most multi-skilled across adviser/ design/delivery Some front line staff are 'licensed deliverers' to help deliver large scale programmes (eg new products) — they get basic training to do this
Skills	Advisers needed to take on needs analysis and evaluation as well as delivery — existing trainers had input to achieve this Now need more 'junior consultancy skills' to handle move from classroom to blended learning Skills needed: :: Learning theory knowledge :: Delivery experience :: Design experience :: Advisory/consultancy skills :: Knowledge of the business
Resourcing/ Careers	Newer types of trainers have higher market rates — they discovered they were paying in lower quartile — danger of losing them Plan to recruit new training advisers from outside with full skill set and bring recruits up to speed with the company May also take some 'licensed deliverers' and get them to take certificate in training practice and build up into role over a couple of years Licensed deliverers have knowledge of business but no knowledge-base about learning

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Case Four: ElectronicsCo

Business Context	Decentralised company with individual businesses setting their own strategies and objectives Common identity includes emphasis on innovation
Delivery Methods	Major roll-out of e-learning infrastructure in progress via intermediary
Structure	Very devolved model of T&D, which mirrors decentralised organisation Much training outsourced in Shared HR Service Centre and an e-HR environment of employee self-service is being introduced Different levels of management dealt with in different parts of international organisation Some dangers of competing internal providers — 'trainers stumbling over each other'
Roles	Putting training into service organisation did not ensure it met business needs — lack of strategic linkage — 'market is dumb' Backroom 'development' people, occupational psychology assessment and evaluation versus consultants In e-learning internal people act as interface between external provider and internal customers — select and adjust courses, negotiate best deal
Skills	Training consultants need sales skills as units have to buy training, also need to have good training skills Managers of training function need project management and purchasing skills Skills in e-learning interface people — project management, assessing providers and how they operate, assessment of packages, selling/influencing, securing senior support, confident to deal with IT people as close partners
Resourcing/ Careers	Recruiting consultants difficult — lack commercial and sales skills More likely that successful recruits have run their own businesses — needed to increase money offered — took many months to get them Managers of training function mainly HR people Ought to be easier for HR people to move into and out of training, although no longer cosy area People in e-business provider had mix of backgrounds — subject areas, education professionals ('just another blackboard')

Case Five: EngineCo

Business Context	Specialist mature market Recruitment and retention of skilled technical workforce is important in face of pressure from higher-paying related industries
Delivery Methods	In-house training centre used for customers, employees and exhibitions for local community e-learning: targeting effort at usage for knowledge transfer and workplace learning after classwork based knowledge acquisition Proposal to introduce global information system (e-HR) with remit to support employee and career development Corporate Curriculum agreed through line-led 'faculties', delivered locally
Structure	Business units are the primary structure 'Virtual Matrix' structure for T&D with central resource and key stakeholders planted in business units Works alongside HR colleagues in HQ and employee development locally
Roles	At HQ roles cover: OD consultants/providers, advice on sourcing professional development, management and exec. education, some in-house capacity plus external purchasing, advisers on e-learning, operational management of T&D Shift from training delivery with a bit of buying and consulting, to training needs analysis and consulting and buying, plus a bit of design and delivery Locally, one senior role in employee development — identify needs, manage local budget, career support Classroom role has shifted from delivering script to 'facilitators and process consultants'
Skills	In-house trainers used for business knowledge or specific technical skills — outsourced management training and for some core programmes Three key skills: for internal consultant and business partner :: flexibility, teamworking, positive mindset to help business think through training needs :: expertise/depth of knowledge in something :: influencing change rather than reacting to it
Resourcing/ Careers	In-house plus external providers plus people on short-term contracts (eg language training) plus associates (personal skills training) plus partners Challenge in future of right type of associates — currently often ex-employees

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	Core — mix of engineers coming into training (for technical matters — need training [skills]) and personal skills trainers (often from outside, need business knowledge) Hardest to recruit into consultancy team and management training — lack of facilitation skills and credibility as 'business partner' People with general HR background not strong enough Growing from within too slow in decreasing core of trainers In future, might take more line managers into training Not sure if progression from training admin into professional training roles possible in future If you do move into training consultancy, then harder to move back out into HR generalist role or into other line role — it is getting to be a specialist career

Case Six: HighTechCo

Business Context	Over-capacity in market place Cost-reduction critical
Delivery Methods	Major investment in e-learning three years ago to replace classroom training wherever possible All training delivery management outsourced Single, global HR information system (e-HR) in place. Supports self-managed development
Structure	Highly centralised T&D with local business unit director who commissions T&D on behalf of business. Tensions between this and local needs
Roles	Managing commissions at centre It is outsourced suppliers who see most of business. Loss of understanding by T&D function. High level business partners feel rather isolated — can end up as mediators between business and suppliers
Skills	Becoming contract managers
Resourcing/ Careers	Up to now has hired back experienced ex-employees as freelancers/ associates but this is an ageing pool How will people become experienced training specialists in future? — too big a gap between sales trainer and business partner Thinking of bringing line managers into the role, but who will then do quality and evaluation? Will some come through outsourced providers back into company roles?

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